



# Making it Easy for Field Medical to Find the Content They Need in CRM

Veeva Medical Community Forum  
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# Why Are We Here?



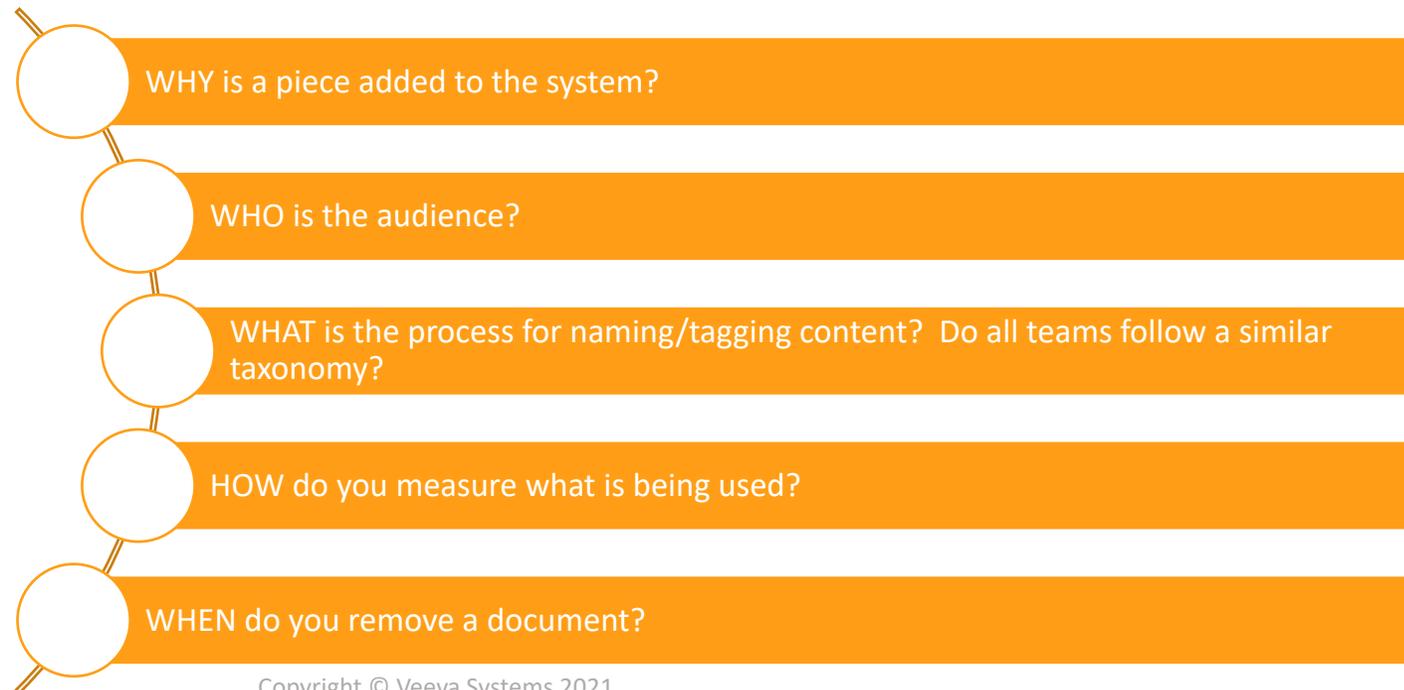
- Do your MSIs complain about CLM?
- Do you want it to be easier for them to find the content they need?

- Let's look at some things you can do right now



# Importance of a Content Management Strategy

- Due to the breadth of discussions, medical users have more content than other sales teams
- However, with all the additional content, it becomes more difficult to find a particular document and could potentially increase sync time
- **Before we talk about the available options for classifying and finding content**, we want to address the importance of having a strategy to add and retain only the documents that are needed
- This will result in a more manageable library of content and make for a more efficient, streamlined CRM experience for medical teams to find and leverage content



# Best Practices

## Content Management

- Be thoughtful and consistent with your overall document classification approach
- Create a tight collaboration between content managers and medical teams to ensure all understand how best to set up the taxonomy for a document in Vault to make finding content in CRM easy
- Analyze document usage and remove items that are not utilized
- Don't underestimate change management; continually reinforce the behaviors you think will make the medical teams most effective in finding the content they need
- If you do decide to modify your classification approach, don't be overly concerned with effort required to update existing content. **It's not all or nothing.** Prioritize by usage – document updates can be done in phases. Talk to your Vault team about mass update capabilities
- Personalization is available to allow individual users to also manage their content as they see best



# What do you want the MSL's search experience to be?

## Click to Find



A visual, click-based approach, allowing users to browse the entire library and progressively narrow down, using intuitive interface

How:

- Group By
- Directories
- Filters
- Labels
- Favorites

Pros: Users see other content, and experience the classifications, which helps them find things in future

Cons: It may take more than one step to find the right content

## Type to Find



From blank screen, start typing search terms

How:

- Enable CLM search

Pros: Potential to find content instantaneously

Cons: Search logic (on iPad) is advanced and users may not always understand all results. No visibility into classification

## Click and Type



Both can coexist in the same org

How:

- Allow all the above

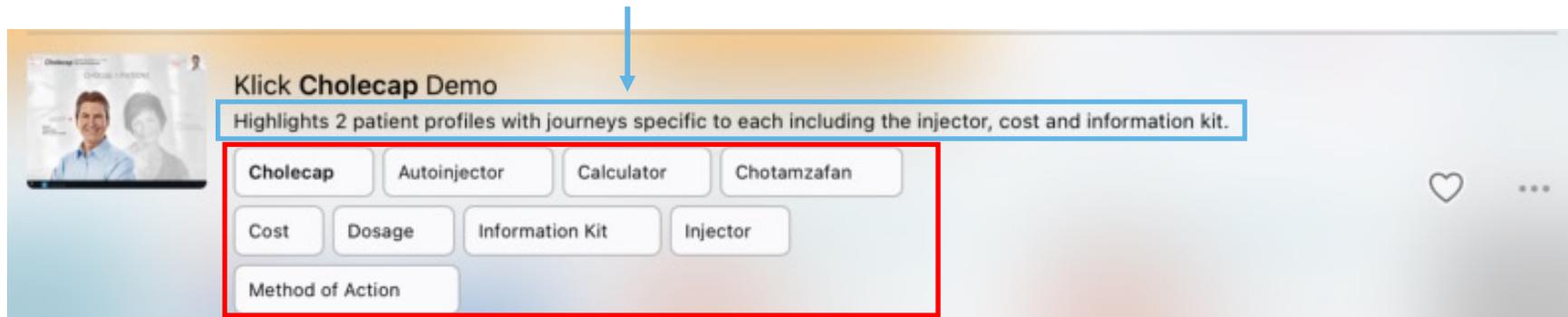
Pros: Offering both provides flexibility ... people's minds work in different ways ... situations can differ too

Cons: Nothing major, other than that (on iPad *today*) you can't start with one and narrow down with the other



# Best Practices for Searching the Media Library

- Ensure that users understand how search works and the nuances (and/or & impact of filter fields) so that they can get the appropriate results
- Thoughtful and consistent in how documents are defined in Vault
  - CLM Presentation Names should be clear and not include document identifiers CRM users don't understand
  - Tips for the Description field
    - Think of it as a more effective version of the "full content search" most ask for as the search feature will look at the all the words defined
    - If the doc has an abstract, copy/paste that
    - If no abstract, add text that summarizes the content and intended use



- Tips for Keywords
  - Good for ever-expanding lists like study numbers, compound numbers, years, etc.
  - Ensure these are created in conjunction with medical teams so the right terms are used

# How Document Information from Vault displays in CRM

**Name**

**Title/Description**

**Keywords**

**Directory**

**General Properties**

- Name: Cholecap Blue
- Title: Introductory Cholecap presentation for HCPs looking to make a switch from another statin.
- Type: Presentation
- Document Number: VV-00365
- Created By: Sandra Schmitt on 6/5/2015 4:55 PM EDT
- Last Modified By: Melissa Meany on 8/17/2016 10:39 AM EDT
- Version: 4.0
- Lifecycle: Binder Lifecycle
- Status: Approved
- Affiliate: [Link]
- Country: United States

**Multichannel Properties**

- Presentation Id: [Link]
- CRM Content Channel: [Link]
- Source Vault Link: [Link]
- Keyword: Provastatin, LDL-C change, Diagnostic Results

**CLM Properties**

- Sharing Rules: All
- CLM Content: Yes
- Start Date: [Link]
- End Date: [Link]
- Hidden: No
- Training: No
- Directory: Cholecap
- Survey: Cholecap Blue Survey
- Enable Survey Overlay: Yes

Carrier 7:47 PM 100%

Cholecap Blue

Cholecap - Custom - Mark

**Cholecap Blue**

Introductory Cholecap presentation for HCPs looking to make a switch from another statin.

Provastatin LDL-C change Diagnostic Results

Cholecap Dr. Abrams

Carrier 7:49 PM 100%

CLM Presentations My Presentations Favorites Recents Training

CLM Presentation Name	Product	Type
Cholecap Blue	Cholecap	Official Presentation
Cholecap Fewer Adverse Events Brochure 2014	Cholecap	Official Presentation
Cholecap Main	Cholecap	Official Presentations

Reset Filter Apply

Labels Edit

- Cholecap (5)
- Unassociated (26)
- Create New Label

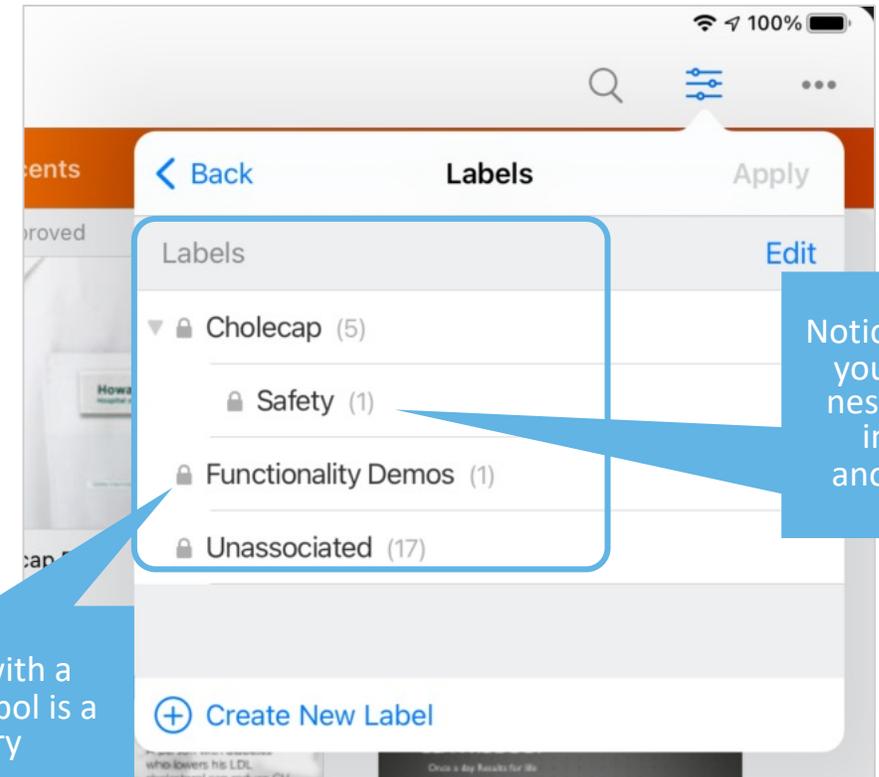
Vault

CRM iPad



# Directories

- Allows CLM Presentations to be organized into folders and sub-folders (directories)
  - Folder structure can be defined by the Content Administrator
  - Users need to navigate through the folder hierarchy to get to the presentations
  - A user can only select one directory at a time to view its content.
  - You cannot search on a directory name
- What makes a good directory?
  - Helps when a logical nesting relationship exists (like EU > Italy)
  - Can be up to 4 levels deep but best practice is to not create more levels than what is needed
  - Be consistent across teams on how these are set up to avoid confusion for users

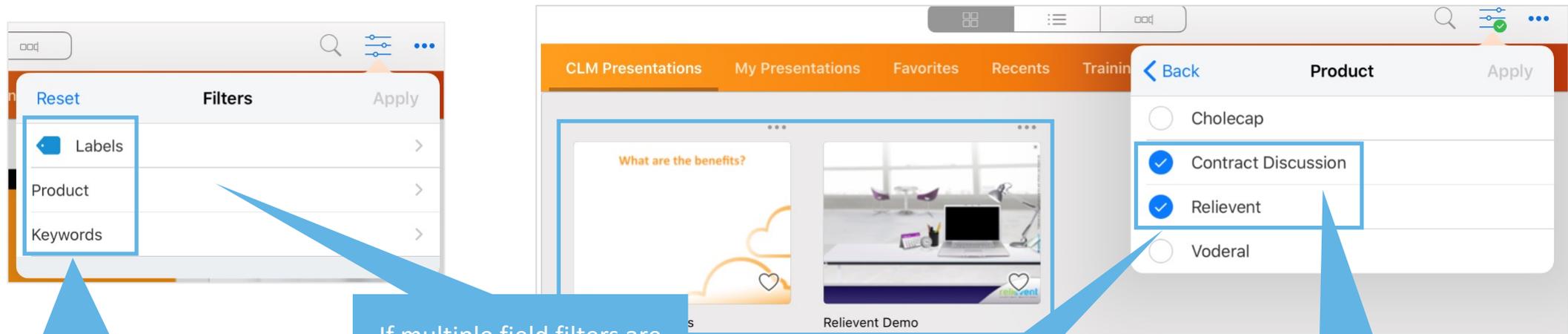


Notice how you can nest one into another

Any label with a padlock symbol is a Directory

# Filtering Using Presentation Attributes

- Use presentation attributes to filter the number of presentations that display
- Can be used in conjunction with existing labels and directories
- Multiple filters can be applied at the same time
- Can also be applied to search results to narrow the list to find the correct presentation (Online only)
- Profile specific Veeva Messages can be configured to allow for teams to have what they need



When filters are configured, labels and directories are nested in the Labels option

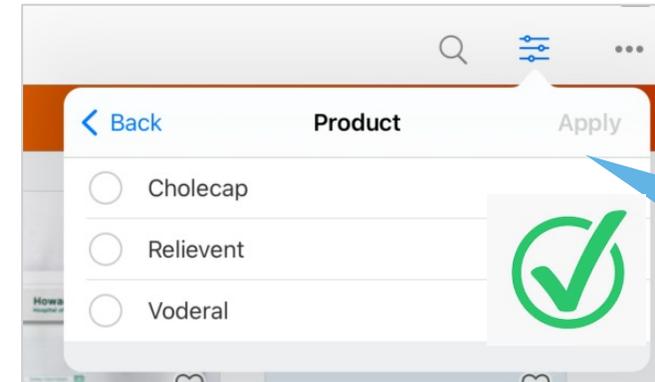
If multiple field filters are applied (e.g., Product and Keyword), only presentations satisfying all of the field filters display

Presentations satisfying any of the selected values display

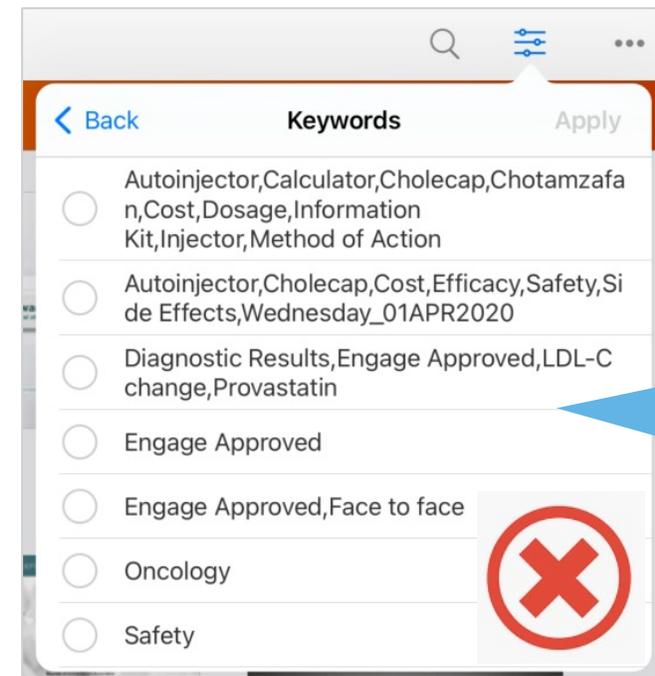
Multiple filters can be applied within a single field filter

# CLM Filtering Using Presentation Attributes

- What makes a good filter field?
  - Fine to have lots of filters, but each filter should have a finite number of values
    - Proactive/Reactive
    - Product
    - Therapeutic Area
    - Document type
    - Country
    - Language
  - Ideally never is blank (i.e., every piece of content should have one, and only one, value for each filter)
  - Avoid common words as filter values since user might inadvertently type an exact match, limiting results
  - We do not recommend using Keywords as a filter field



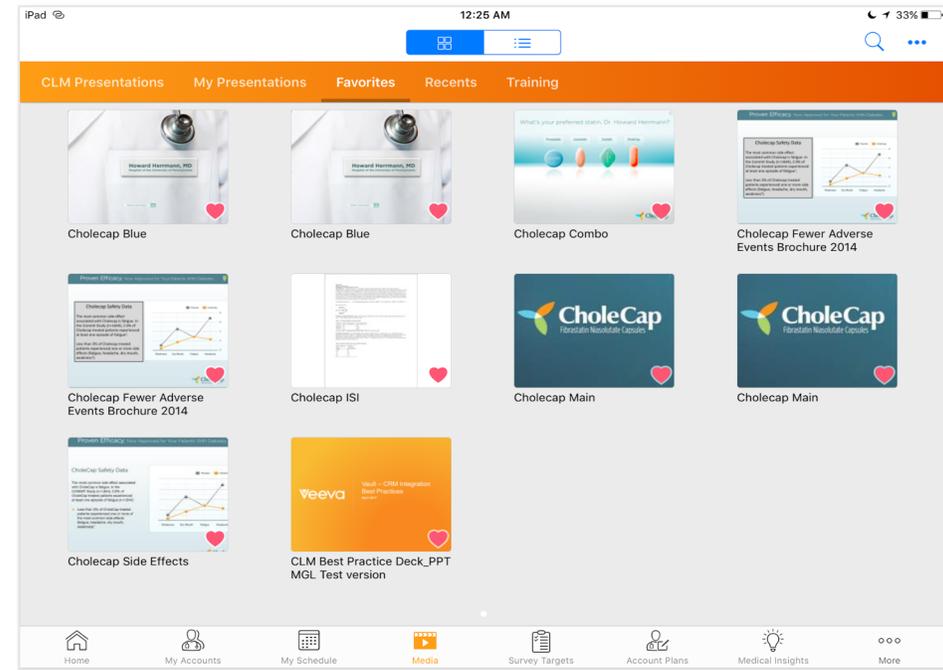
Finite number of values and easy to identify the needed value



Fields that may have concatenated value, like Keywords, do not make good candidates for filters

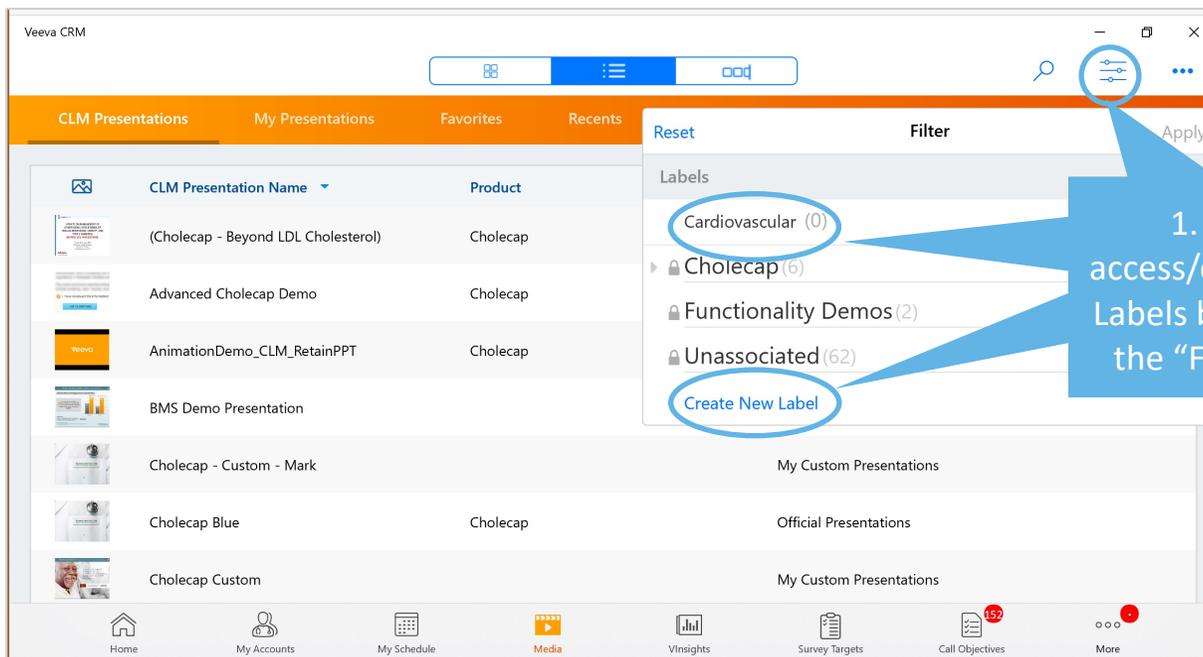
# Accessing Favorite Presentations

- Users can flag presentations as Favorites which allows them to also display in a separate tab
- If an existing “Favorite” presentation is updated with a new version, they will remain in the Favorite Tab
- Information for Favorites presentation is stored locally on each users iPad; if the user deletes the app or switches devices they will lose the Favorites selected
- The Favorites designation does not sync between online and offline. If a document is flagged as a Favorite online, it will not have that flag offline and vice versa

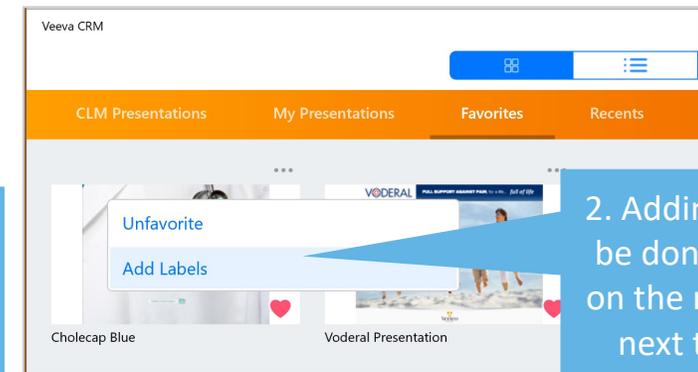


# Presentation Labels

- Users can create and add custom labels to CLM Presentations to all for personal organization
- Custom labels are unique to individual users
- Labels are local to the device they are created on. Labels created online do not appear offline and vice versa
- Labels and directories cannot be applied at the same time



1. You can access/create or edit Labels by clicking on the "Filter" menu



2. Adding Labels can be done by clicking on the menu button next to the CLM presentation



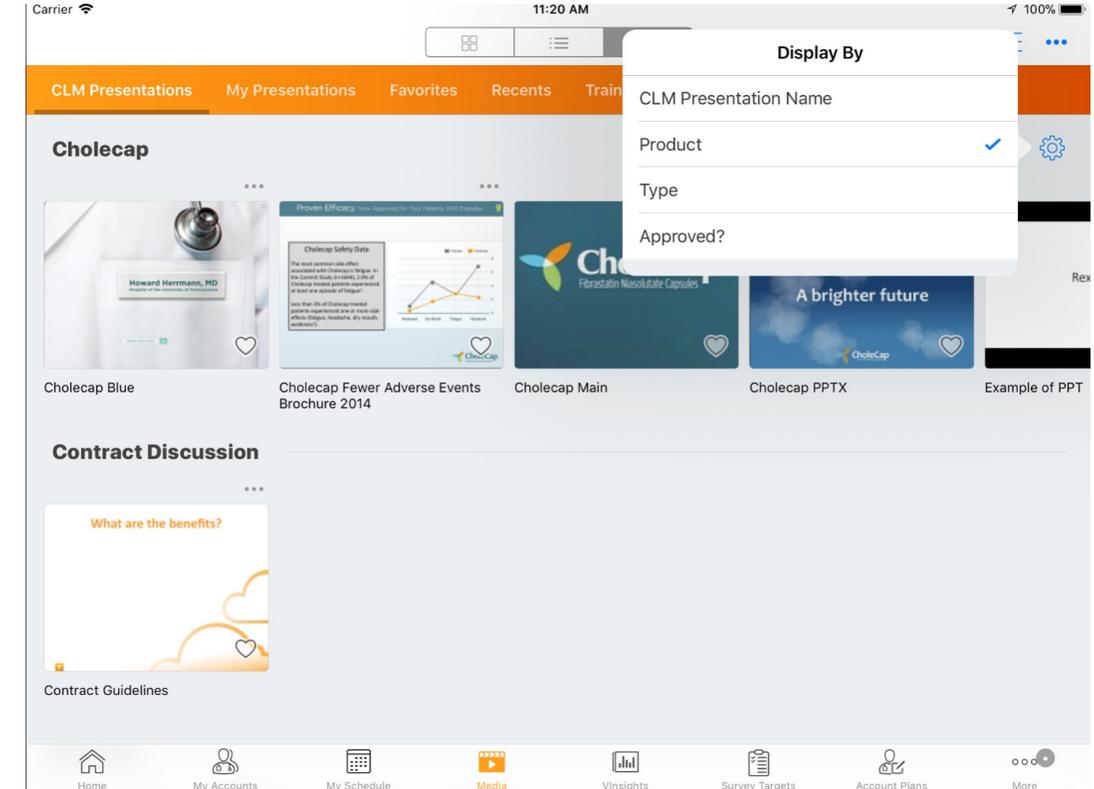
3. Several Labels can be assigned to one CLM Presentation

# View Presentation by Group

- Columns defined in the CLM Presentation Grouping Veeva Message display as separate, sortable columns in the Table view
- Gear appears in the Tile view to group by an attribute

CLM Presentation Name	Product	Type	Segment
RFA Cholecap Demo		Official Presentations	
Cholecap Main	Cholecap		
Example of PPT	Cholecap		
GRT Original	Cholecap		
Click Cholecap Demo	Cholecap	Official Presentations	New Doctor
Professional Materials Shopping Cart	Cholecap	Official Presentations	
Special Article - 2015 American College of Rheumatology Guideline for the Tre...	Cholecap	Official Presentations	
Contract Guidelines	Contract Discussion	Official Presentations	
Relievent Demo	Relievent	Official Presentations	
Voderal Presentation	Voderal	Official Presentations	

Table View

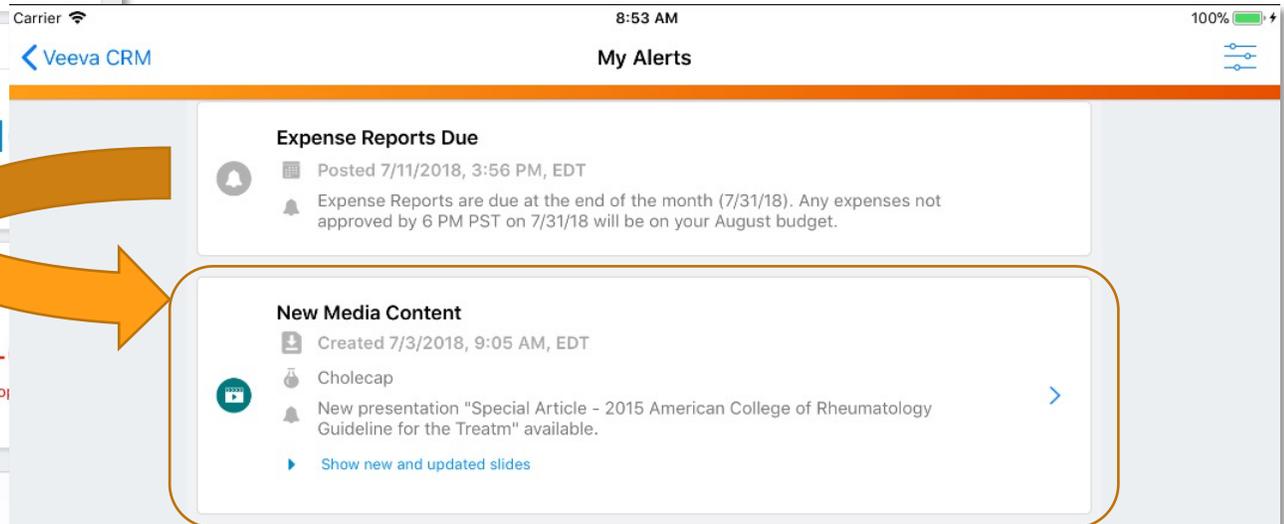
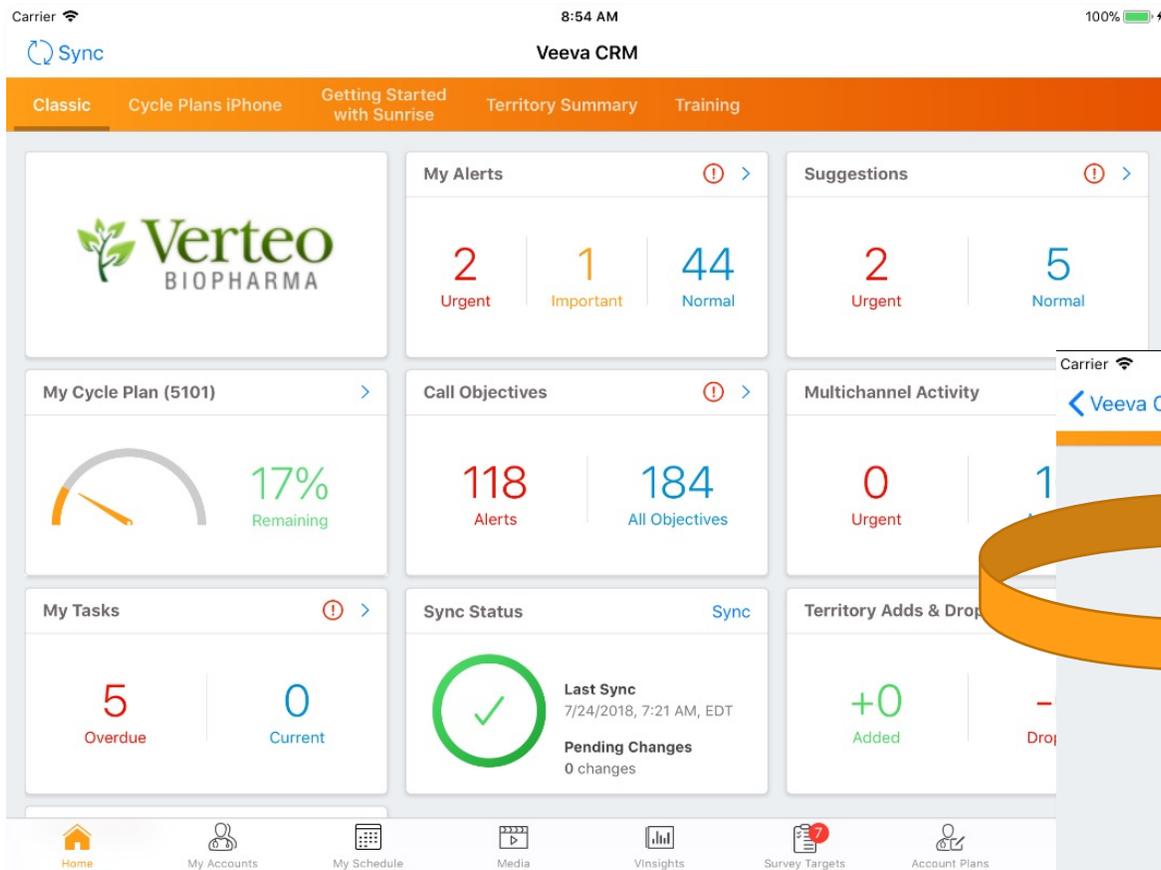


Tile View



# Understanding When New Content is Available

- Alerts on the mobile homepage to allow user to know about new/updated content being available
- There is a Veeva Setting that controls whether this appear, and the number of days they will display
- Best Practice – besides Veeva Notifications, also send an email or other form of communication to notify of the new content and how it is intended to be used



# Frequently Asked Questions

## I need the ability to search within documents!

- In our research, this does not always help medical users locate the desired presentation
- Documents are long, and contain so many words, this does not actually narrow down the search results
- Tell customer story who custom-enabled this, and turned it off
- Users need to be VERY savvy to know specific words that ONLY appear in certain articles ... hard to train users this way at scale
  - And if you already do know those specific words, then it should be added to metadata so existing search will work, and more quickly (since full text search can be slow)
- Use the “Description” field to contain main points of the article. This field does get searched: Consider this a full-document search alternative
- We’re not ruling out the possibility of this feature in the future, but the priority is to improve the search we already have today, so customers that have invested in this can harvest value

## I’m typing more search terms ... why aren’t the number of results decreasing?

- If you start with a filter term, you can add more words, but that won’t narrow (or widen) the # of search results. It will re-prioritize the results, so the one you want is more likely to be seen earlier.

## How do I handle content related to a conference?

- There are probably only a handful that matter (which lends itself well to a *filter*)
- But if *year* matters, then it becomes an ever-expanding list (so *keywords* may be a better bet)





Thank you