

# Veeva CRM Advanced Concepts Training

*COURSE CONTENT*

## GET IN TOUCH



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## About Multisoft

Train yourself with the best and develop valuable in-demand skills with Multisoft Systems. A leading certification training provider, Multisoft collaborates with top technologies to bring world-class one-on-one and certification trainings. With the goal to empower professionals and business across the globe, we offer more than 1500 training courses, which are delivered by Multisoft's global subject matter experts. We offer tailored corporate training; project Based Training, comprehensive learning solution with lifetime e-learning access, after training support and globally recognized training certificates.

## About Course

Veeva CRM Advanced Concepts Training by Multisoft Systems is designed to help professionals gain in-depth expertise in managing and optimizing Veeva CRM for the life sciences industry. This advanced-level course focuses on complex configurations, integrations, and data-driven functionalities that enhance customer engagement and operational efficiency.

## **Module 1: Advanced Veeva CRM Architecture & Platform Overview**

- ✓ Veeva CRM architecture (Salesforce-based platform)
- ✓ Vault CRM & ecosystem integration
- ✓ Data model: Accounts (HCP/HCO), products, territories
- ✓ Environment setup (Sandbox, Production)
- ✓ Security, compliance & regulatory standards

## **Module 2: Advanced Configuration & Customization**

- ✓ Custom objects, fields, and page layouts
- ✓ Workflow rules, approval processes, validation rules
- ✓ UI customization and business logic implementation
- ✓ Configuration utilities and metadata management
- ✓ Role hierarchy, profiles, and permission sets

## **Module 3: Data Management & Governance**

- ✓ Master data management (MDM) concepts
- ✓ Data loading, migration & deduplication strategies
- ✓ Data quality, integrity, and compliance
- ✓ Territory alignment and account segmentation
- ✓ Audit trails and data governance practices

## **Module 4: Advanced Call Reporting & Activity Management**

- ✓ Call planning and execution workflows
- ✓ Call reporting configuration and templates
- ✓ Sample management and compliance tracking
- ✓ Activity tracking, KPIs, and performance monitoring
- ✓ Cycle plans and execution strategies

## Module 5: Closed Loop Marketing (CLM) & Multichannel Engagement

- ✓ CLM content management and delivery
- ✓ Email integration and digital engagement tools
- ✓ Remote detailing and virtual interactions
- ✓ Campaign management and customer journeys
- ✓ Compliance in multichannel communication

## Module 6: Reporting, Dashboards & Analytics

- ✓ Standard vs custom reports
- ✓ Dashboard creation and optimization
- ✓ Sales performance analytics
- ✓ Territory and account insights
- ✓ Data-driven decision-making techniques

## Module 7: Integration with External Systems

- ✓ Integration with ERP, marketing automation tools
- ✓ Veeva Vault integration concepts
- ✓ Data synchronization and APIs
- ✓ Salesforce integration fundamentals
- ✓ Real-time and batch integration approaches

## Module 8: Workflow Automation & Process Optimization

- ✓ Automation strategies in Veeva CRM
- ✓ Business process optimization techniques
- ✓ Alerts, notifications, and triggers
- ✓ Approval workflows and lifecycle management
- ✓ Enhancing operational efficiency

## **Module 9: Compliance, Security & Regulatory Requirements**

- ✓ Pharma compliance (FDA, HIPAA, GDPR basics)
- ✓ Consent management and audit tracking
- ✓ Data privacy and access control
- ✓ Validation and compliance reporting
- ✓ Industry best practices

## **Module 10: Mobile CRM & Field Force Effectiveness**

- ✓ Veeva CRM mobile (iPad/iPhone) usage
- ✓ Offline/online synchronization
- ✓ Field user experience optimization
- ✓ Territory-based access and mobility features
- ✓ Best practices for field representatives

## **Module 11: Advanced Use Cases & Real-Time Projects**

- ✓ Real-world pharma CRM scenarios
- ✓ Case studies on sales and marketing execution
- ✓ Troubleshooting and performance tuning
- ✓ Implementation strategies
- ✓ Hands-on project and assessment

## **Module 12: Future Trends & Enhancements in Veeva CRM**

- ✓ AI capabilities in Veeva platform
- ✓ Digital transformation in life sciences CRM
- ✓ Emerging engagement models
- ✓ Industry trends and roadmap