Veeva CRM Fundamentals Training

COURSE CONTENT

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

The Veeva CRM Fundamentals Training by Multisoft Systems is designed to provide professionals with a strong foundation in Veeva CRM, the leading customer relationship management platform built specifically for the life sciences industry. This training equips participants with essential knowledge of CRM architecture, navigation, and core functionalities required to manage healthcare professional (HCP) interactions effectively and compliantly.

Module 1: Introduction to Veeva CRM & Life Sciences CRM Landscape

- ✓ Overview of Customer Relationship Management in Life Sciences
- ✓ Introduction to Veeva CRM
- ✓ Understanding the role of Veeva Systems
- ✓ CRM architecture and cloud environment basics
- ✓ Key terminology: HCP, HCO, Territory, CLM, Samples
- ✓ Navigation and user interface overview

Module 2: Account & Contact Management

- ✓ Managing Healthcare Professionals (HCPs) and Healthcare Organizations (HCOs)
- ✓ Account hierarchy and affiliations
- ✓ Adding, editing, and maintaining customer records
- ✓ Address management and validation
- ✓ Data quality and compliance considerations

Module 3: Territory & Alignment Management

- ✓ Territory concepts and structures
- ✓ Territory assignment and alignment
- ✓ Managing customer visibility
- ✓ Role-based access and security fundamentals

Module 4: Call Planning & Call Reporting

- ✓ Planning sales calls and scheduling visits
- ✓ Recording call details and capturing interactions
- ✓ Product detailing and key messages
- ✓ Capturing discussion topics and activities
- ✓ Compliance in call documentation

Module 5: Closed Loop Marketing (CLM)

- ✓ Introduction to Closed Loop Marketing (CLM)
- ✓ Using CLM presentations during calls
- ✓ Tracking customer engagement and responses
- ✓ Content management basics

Module 6: Sample & Inventory Management

- ✓ Sample disbursement process
- ✓ Capturing sample transactions
- ✓ Sample reconciliation and compliance tracking
- ✓ Regulatory guidelines and audit readiness

Module 7: Events & Multichannel Engagement

- ✓ Event management fundamentals
- ✓ Email integration and remote engagement
- ✓ Multichannel interaction tracking
- ✓ Activity history management

Module 8: Reports & Dashboards

- ✓ Standard reports in Veeva CRM
- ✓ Creating basic reports
- ✓ Understanding dashboards and KPIs
- ✓ Performance tracking and analytics

Module 9: Compliance & Best Practices

- ✓ Regulatory compliance in life sciences CRM
- ✓ Data privacy and audit trails
- ✓ Best practices for accurate data entry
- ✓ Maintaining ethical engagement standards