

Veeva & U

Webinar

Release Management Best Practices



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Thank you for joining the Veeva & U webinar



Microphones will be **muted** throughout the webinar



Please use Q&A function to ask questions



Questions will be answered at the end of the presentation



We will email this presentation and the recording of the webinar



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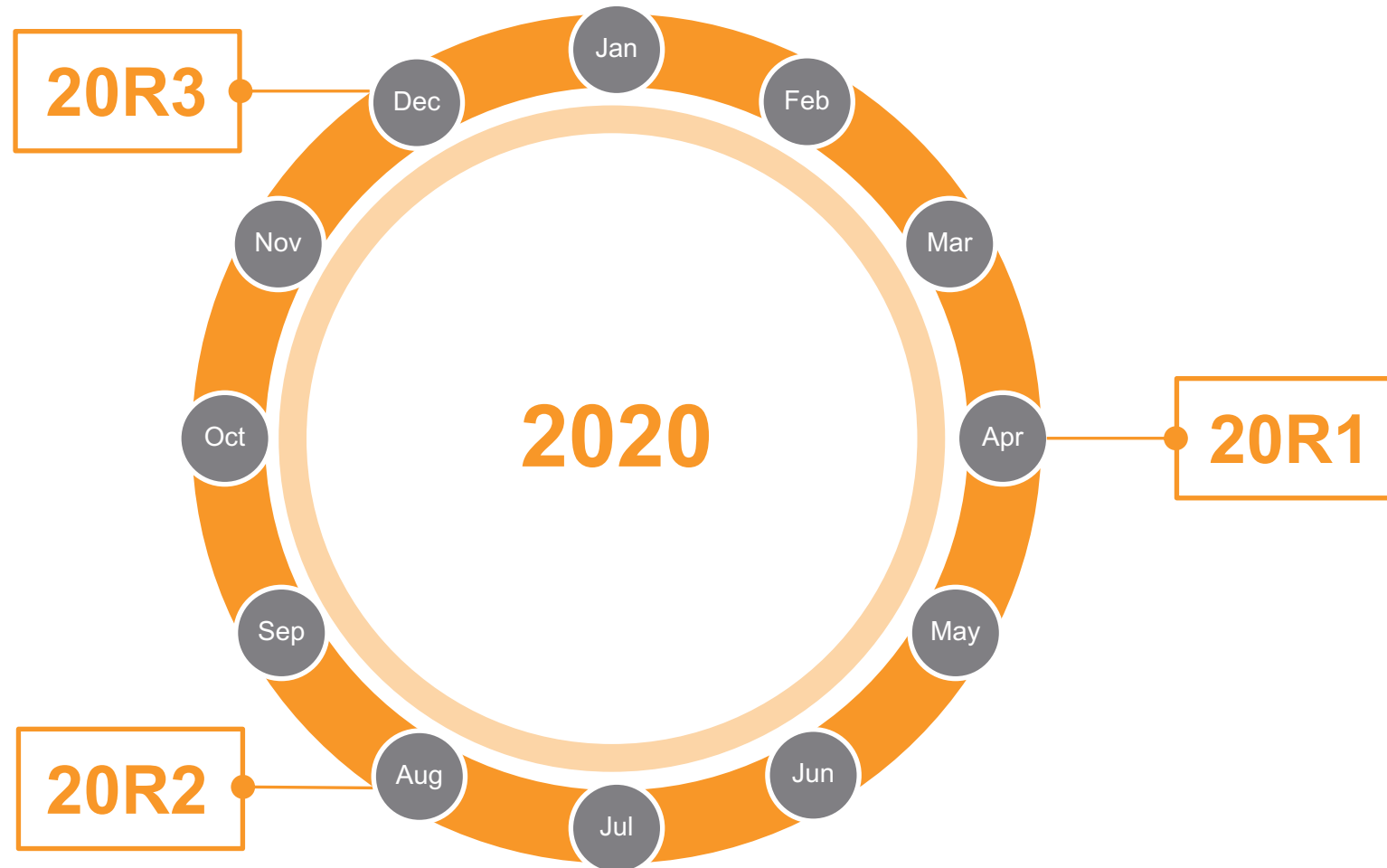
Product Release Process



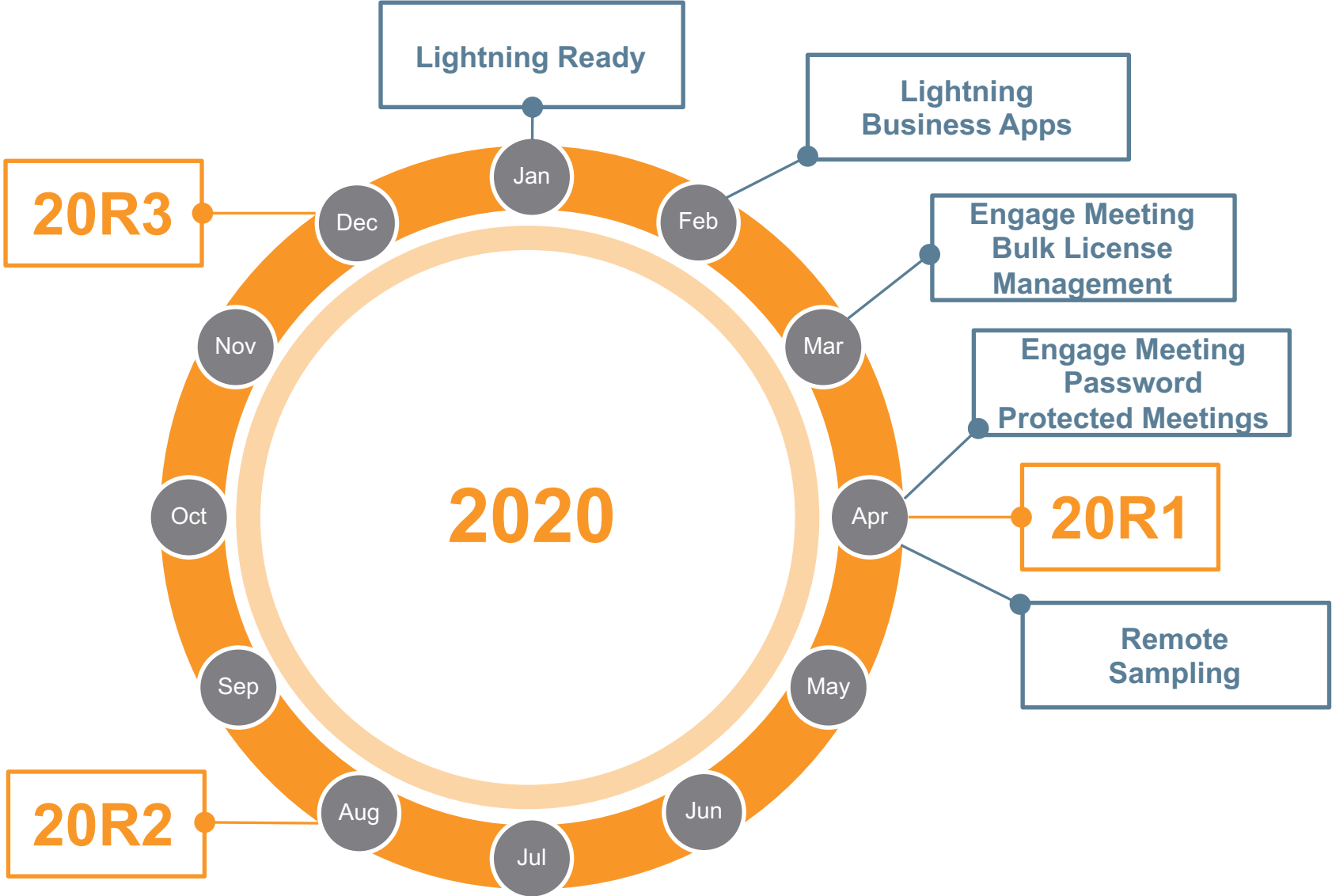
Veeva CRM Suite – Previous Release Cycle



3 Releases Every Year



Veeva CRM Suite – Q1 2020



Lessons Learned from H1 2020



1

- More frequent delivery of new features has multiple benefits:
 1. Tighter loops between customer needs, shipping and adjusting based on real life feedback
 2. Less clustering of features in one big release, spreading it out in more digestible chunks
 3. If a feature can't make it to one release, the delay is not another 4 months

2

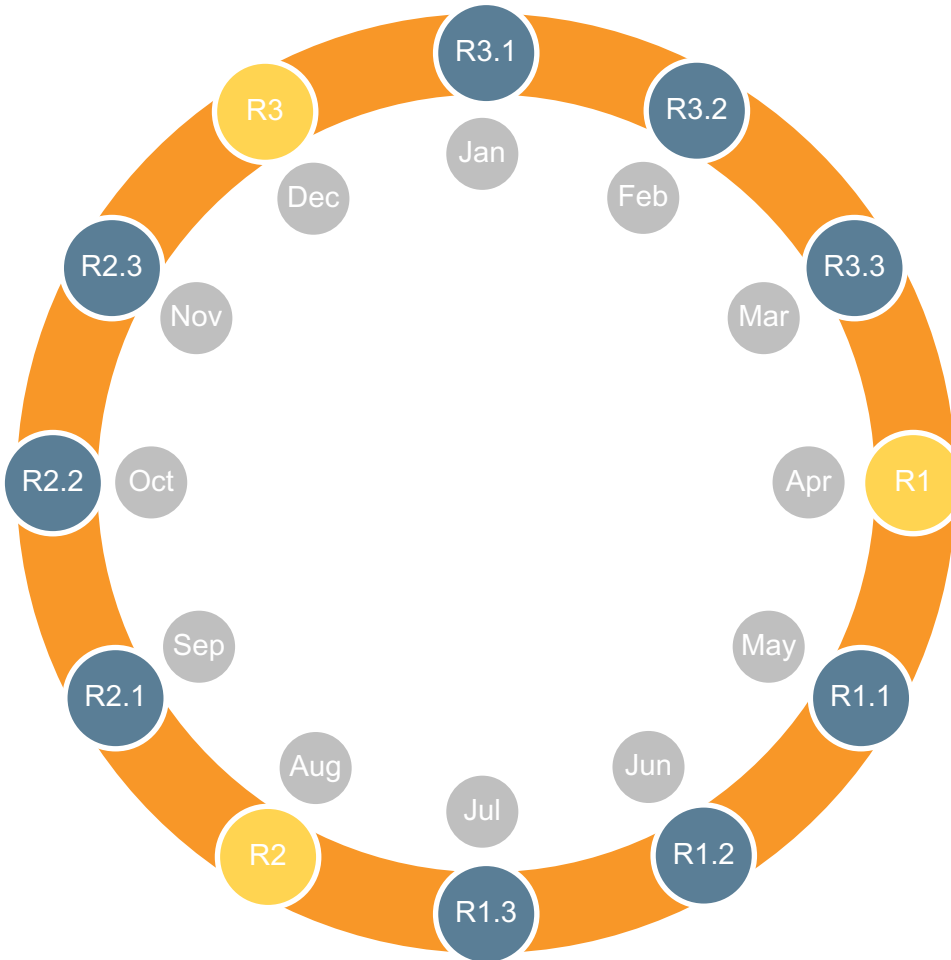
- However, the drawbacks of features in hotfixes are clear too:
 1. No transparency up until the last minute if a hotfix has features in it or not
 2. Not enough lead time to test, validate, adjust
 3. No way to plan schedules around new feature releases

3

- Those findings are the basis for the new release methodology for 2020

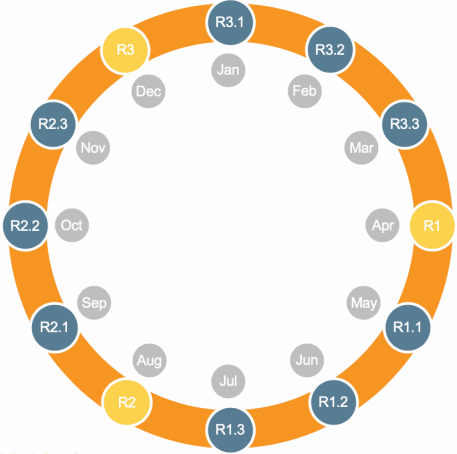


Continuous Delivery



- Monthly release windows for new features
- Hotfixes as needed
- Validation focused on major releases
- Production and Sandbox

Veeva CRM Suite – New Release Cycle 2020



□ 9 Minor Releases per Year

- ✓ 3 Minor Releases per Major Release
- ✓ Can include Fixes and New Features
- ✓ 1 week between Sandbox and Production upgrades

□ 3 Major Releases per Year

- ✓ Stabilization Releases
- ✓ Validated (covers all features from Minor releases)
- ✓ Can include Fixes and New Features
- ✓ 2 weeks between Sandbox and Production upgrades

□ Schedule (starting from August 2020)

- ✓ 2nd week of every month
- ✓ All dates are tentative until officially announced
- ✓ Full release schedule available on Veeva CRM Online Help:
https://crmhelp.veeva.com/doc/Content/CRM_topics/General/AboutCRMReleases.htm

Release Management Process



Feature Enablement Detail



Auto-On Features



Auto - On

Enabled Day 1

No additional
setup required

Configurable Features



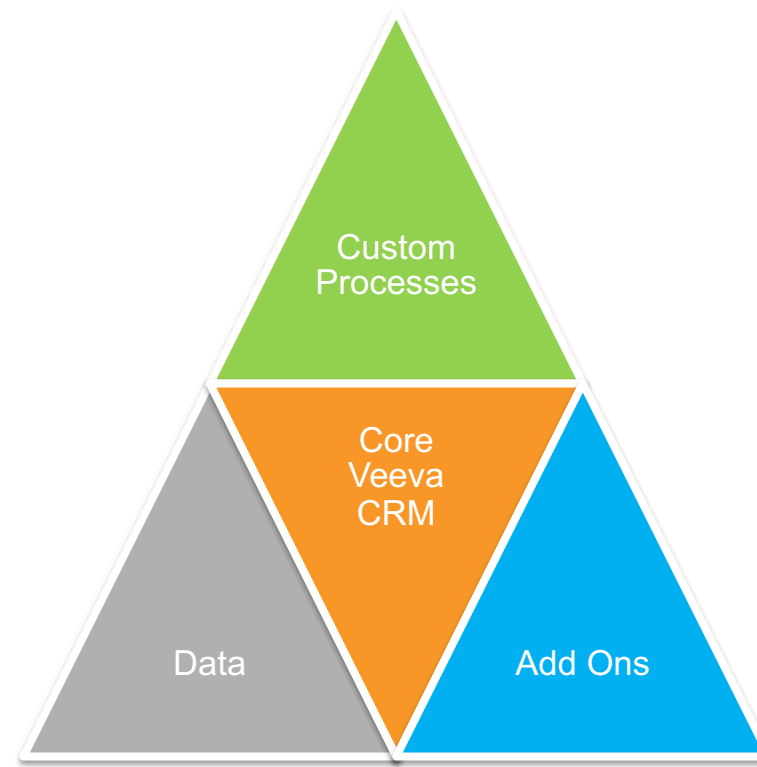
Configuration

Requires
configuration

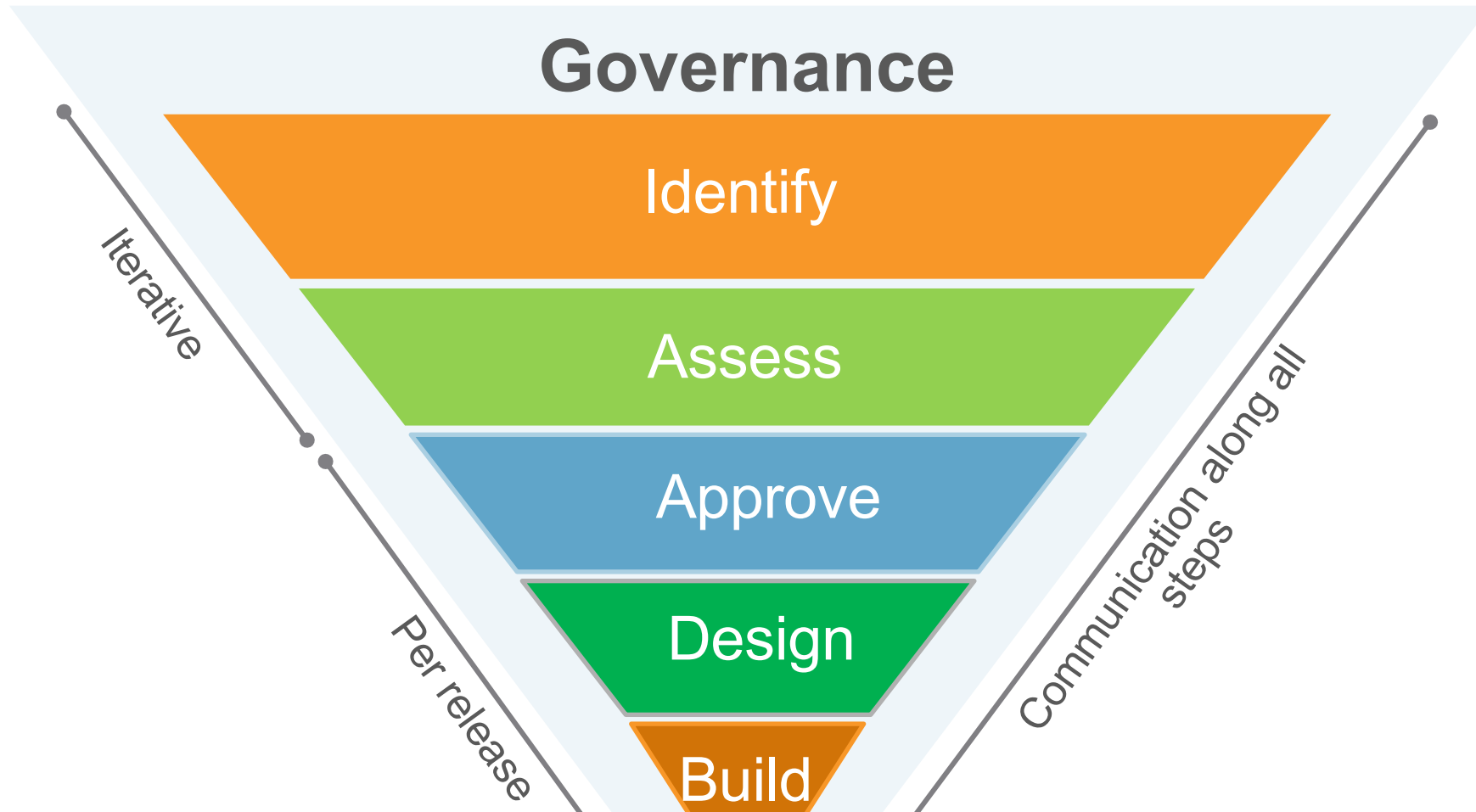
Your Veeva CRM Implementation is a Live System



- **Unique to your business needs**
- **Leverages some but not all functionality available in Veeva CRM**



Framework for Innovation



The **processes** and **policies** used to drive decision making and define ongoing plan and strategy

Design Phase Checklist



1

Design for the 'use case' but also think long term

2

Validate the requirement vs. the solution design

3

Keep it simple

- Avoid code
- Iterate
- Use Standard

4

Consider downstream impacts

5

Close the loop with utilization reports

6

Plan for Change Management (e.g., training, documentation, communication, etc.)

Recommended Strategy



Release Cycle – Traditional Approach

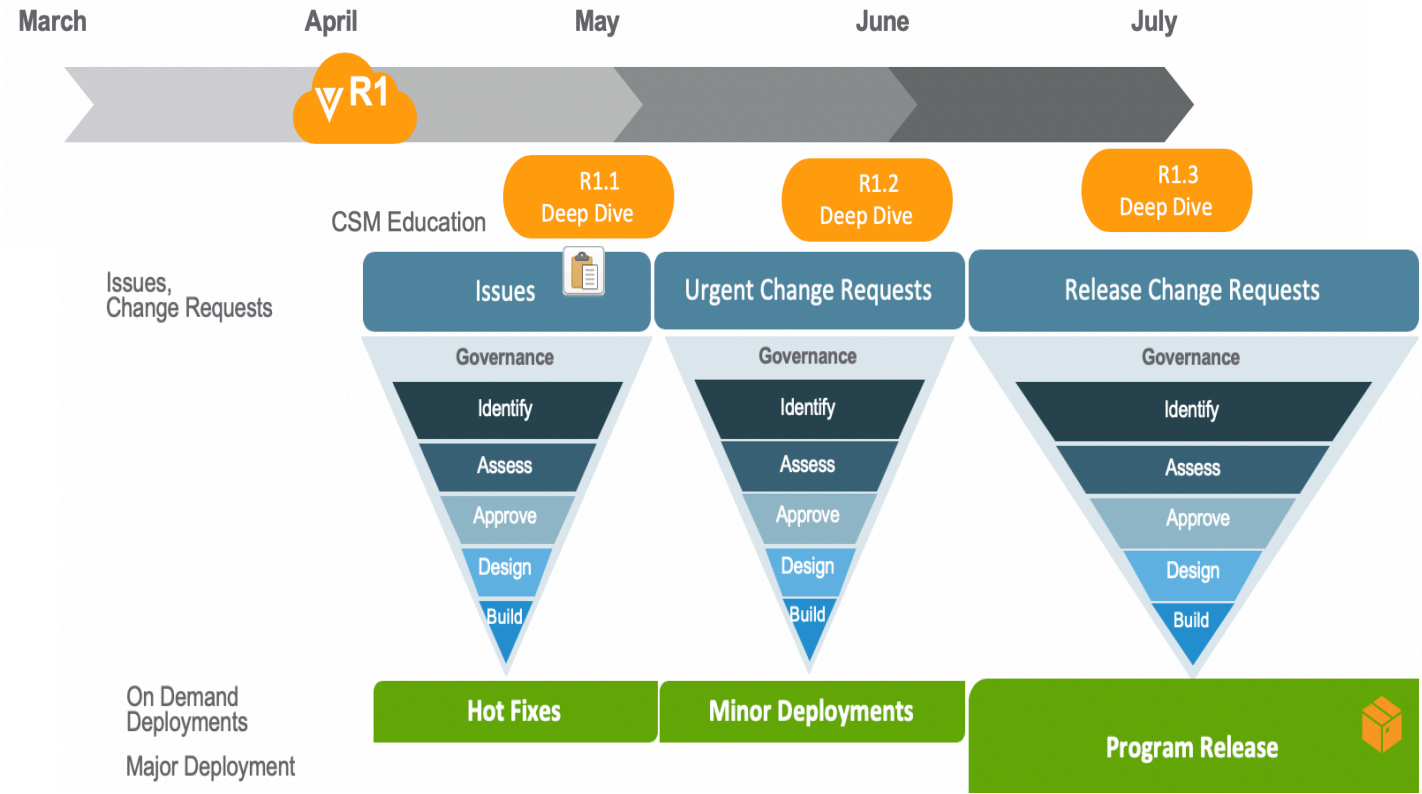


Traditional



PROS : More Time to Plan & Validate

CONS: Major Waiting Time on Delivery & Higher Workload



Release Cycle – Fast-Track Approach



Fast-Track

0

Minor Release for Fixes

0

Minor Release for Urgent Topics

1

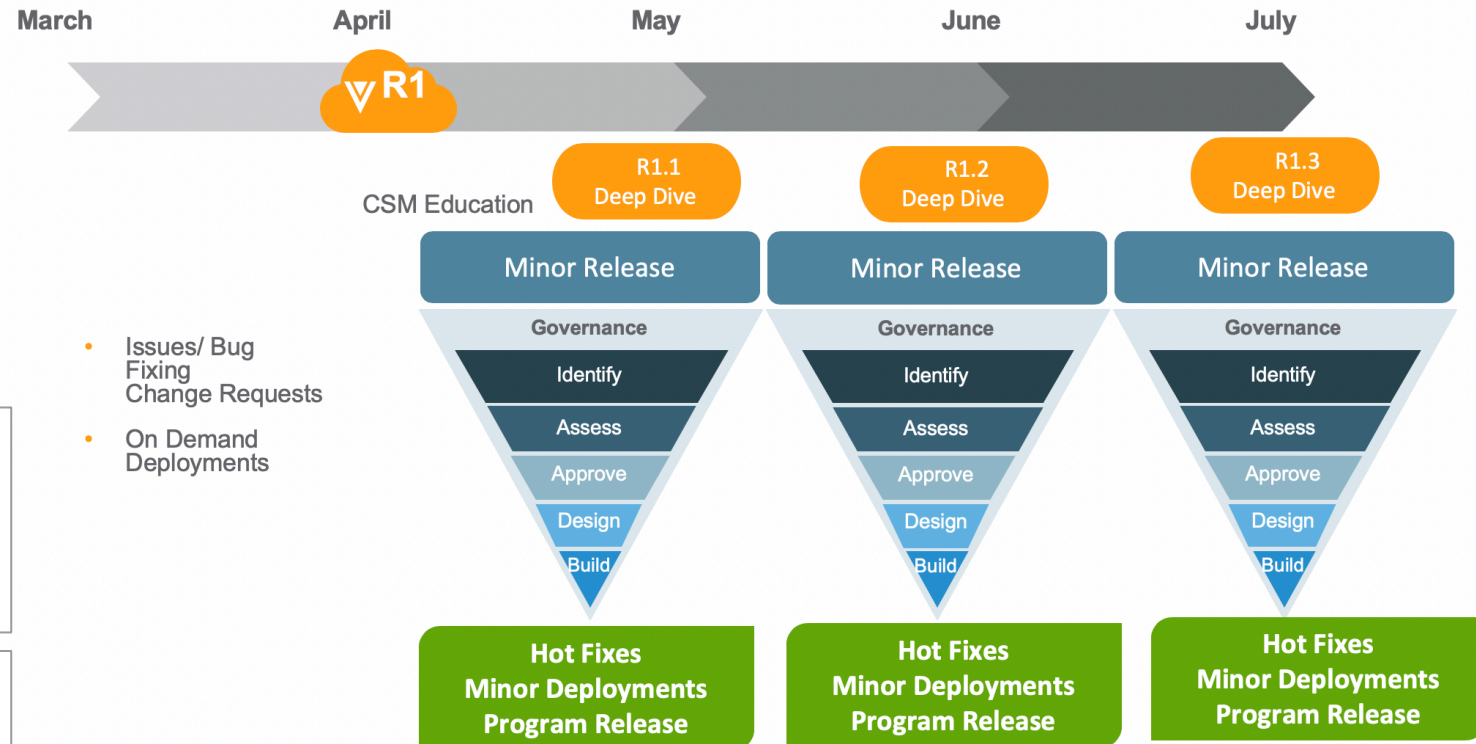
Unique Release for Fixes, Urgent Topics & Deployments



PROS : Continuous Delivery, Innovation, Fast Response



CONS: Communication & Planning needs to be accelerated



Benchmarks – Deployment Methodology



Release Cycle	# Customers
Monthly (3-4 big; 8-9 small)	50%
Quarterly (4 big release)	25%
3 / Year	25%

Trend: More Release
↑

Project Methodology	# Customers
Agile	40%
Moving to Agile	30%
Waterfall	30%

Trend: Move to Agile
↑

Key Challenges

- Deployments not automated enough
- Business can feel overwhelmed with number of releases / changes
- Not enough time to react to release notes and new features

Why Veeva Recommends Agile



- **Fast** – Short sprints allow fast feedback from the business users on requirements and features. Possible to react quickly to changing business environment
- **Flexible** – Changing business priorities are easily absorbed as the requirements list can be adjusted at any time
- **Lean** – The way that requirements and documentation are created should be assessed. Through the use of User Stories and supporting industry standard tools it is possible to capture the full life cycle of a requirement in one place therefore reducing the amount of documentation generated and allowing the stakeholders to focus on value-add activities
- **Adaptive** – Regular formal business reviews allow requirements to be adjusted in build phase before they get to UAT, this means requirements are more likely to meet the business need faster

Resources

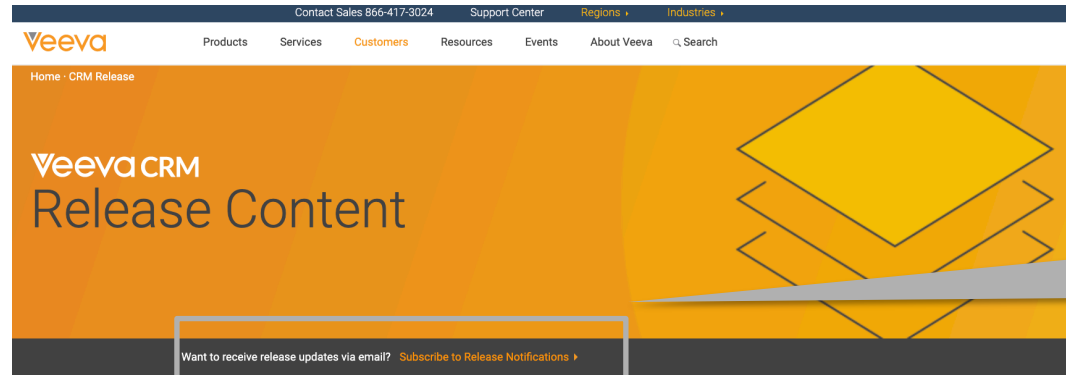


Sign Up to Receive Release Notifications



CRM Release Resource Center

- View upcoming release information and access on-demand content through our new [Veeva CRM Release Kit](#)



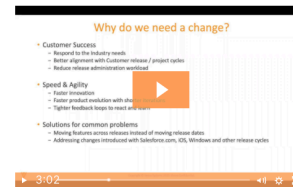
Make sure to register to receive release updates via email

Veeva CRM Release Updates

Veeva CRM is moving to a continuous delivery cycle, with nine scheduled monthly releases including new features and maintenance items, along with three validated releases.

This page highlights recent feature updates and enhancements in Veeva CRM.

For additional detail and release notes, visit [Veeva CRM Help](#).



20R1.2

Sandbox release date: 6.8.20

Production release date: 6.11.20

Join us for the [Veeva CRM CSM 20R1.2 Release Deep Dive Webinar](#) on June 18th at 11 am PT / 2 pm ET to learn about new features in this release, such as **On-Demand Double Opt-in**. This allows users to choose between capturing a signature or sending a double opt-in confirmation email to confirm consent. This functionality applies to Approved Email channels and custom consent channels using email.

[Register Now](#)

20R1.1

Release date: 5.8.20

Watch the 20R1.1 Deep Dive webinar on-demand to learn about new



Release Information



- View upcoming release information and access on-demand content through our new [Veeva&U release tab](#)

The screenshot shows the Veeva website's 'Veeva & U' page. At the top, there is a navigation bar with 'Europe' in a small orange box, followed by 'Veeva' logo and menu items: 'Products', 'Services', 'Customers' (highlighted in orange), 'Resources', 'Events', 'About Veeva', and a search icon. Below the navigation, a breadcrumb trail reads 'Home · Veeva & U Releases'. The main content area features a large blue and teal graphic with the text 'Veeva & U' and 'Your Dedicated Commercial Innovation Hub.' To the right of the text is an illustration of a laptop displaying a dashboard with various icons like a person, a gear, a chart, and a mail icon. Below this graphic is a horizontal navigation bar with five tabs: 'Overview', 'Community Forums', 'CRM Innovation Hub', 'Releases' (highlighted in white), and 'Vault Promomats Hub'. The main content area below the navigation bar has a heading 'Veeva CRM Release Updates' and a paragraph: 'This page highlights recent feature updates and enhancements in Veeva CRM. For additional detail and release notes, visit [Veeva CRM Online Help](#).' Below this is another paragraph: 'Veeva CRM is moving to a continuous delivery cycle, with 9 scheduled monthly releases including new features and maintenance items,'. To the right of the text is a video player with a play button and a title 'Why do we need a change?'. The video player has a list of bullet points: 'Customer Success' (Respond to the Industry needs, Better alignment with Customer release / project cycles, Reduce release administration workload), 'Speed & Agility' (Faster innovation, Faster product evolution with shorter iterations, Tighter feedback loops to react and learn), and 'Solutions for common problems' (Moving features across releases instead of moving release dates).

Supporting Teams on your Release Management



CSM Team

Your CSM will provide you information around Best Practices



Professional Services Team

Your Project Team will guide you through during the project implementation



EAM – Managed Services Team

Your EAM or MS Consultants will guide you through post-project implementation

Questions



3000

attendees from
life sciences

250+

life science
companies

Hear Latest
Technology
Innovations

Get Best
Practices

Connect &
Collaborate

Join our European
Community

— Veeva Commercial & Medical Europe —
SUMMIT ONLINE

17 - 18 November 2020

Register Now

Commercial Operations

Medical

Commercial Content

Data & Intelligence



Thank You

