

# veeva CRM Approved Email

## Five Steps for Successfully Enabling Your Customer Teams with **Approved Email**

### 1. Identify a sponsor

Business sponsor are critical for the success of the project. The sponsor(s), ideally senior operational leaders within the team, will shape the scope and objectives and approve major decisions such as content strategy, governance, and process.

Sponsor name and title \_\_\_\_\_  
 \_\_\_\_\_

### 2. Outline your content plan

The content plan should include the creation of standards and an evaluation of message fragments to use to make content applicable to recent dialogues with your customers. You will need a publication schedule so your content is ready to go on day one. What are your use cases for emails? Start by taking an inventory of any existing email templates, content, and content web destinations you may want to reuse. Consider who will design new templates for you and frequency of new content creation. Consider how best to keep your template messaging fresh – some customers create and approve multiple versions of each template at the same time so they can be rotated.

**CONTENT TYPES (check all that apply)**

- Messaging** (e.g. branded / unbranded comms, clinical information, web assets)
- Market event-driven** (e.g. label change, formulary win)
- Live and virtual event-driven** (e.g. invitation, RSVP, save the date)
- Relationship** (e.g. thank you, sorry I missed you)
- Other** \_\_\_\_\_

Use Case	Content Type	Brand	Audience	Refresh Period	Linked Content	Owner	Status
1.							
2.							
3.							

Template design (person or agency names): \_\_\_\_\_

Is the agency a Veeva partner with expertise in this channel?: \_\_\_\_\_

Content refresh strategy determined? (update frequency based on field visit cadence): \_\_\_\_\_

CRM Ops, Marketing and Approvals aligned on refresh management?: \_\_\_\_\_

**Approved Email Benefits**

- Extends value of calls and meetings
- Personalized and relevant
- Real-time insights for in-field and headquarters users
- Compliant messaging and content sharing

“Approved Email is incredibly easy for reps to use and it helps customers engage with our multichannel resources. We've already seen adoption rates well over what we saw with our legacy solution.”

— Country Sales Director

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## 3. Consider email address sourcing

Accurate email addresses and how you will source your emails will be key to a successful launch. Consider performing a diagnostic data quality check.

### CHOOSE YOUR STRATEGY:

- We already have accurate, permissioned emails in CRM for our full customer base.**  
Great! You're all set.
- We will need to build a database of email addresses.**  
The earlier you start, the better. Raise awareness and educate users on process and governance. Having a clear use case for field teams really helps.
- We plan to purchase email lists.**  
Whilst email lists can be purchased, consent is specific to each company, so you will need a strategy to gain this that complies with local data privacy regulations.
- We need to keep email addresses continuously up to date.**  
Veeva Network could be a complementary solution.
- Our reps are trained to request email addresses and email consent forms.**  
Great! You're all set.
- Our reps need to be trained to request email addresses and email consent forms.**  
Consider kicking off the program with help from Veeva's Multichannel Advisory team.

## 4. Plan for change management

Approved Email is a transformational way for in-field and remote teams to interact with their customers. Continuous improvement through change management will be important for developing new processes and behaviours within the application. Think about what expectations you will set and how you will set them, both for in-field and head office teams (eg. Marketing and Approvals).

### CHOOSE YOUR STRATEGY:

- Executive communications**
- Scenario training** (e.g., what to send, when to send, what content, how to use email activity data)
- Focus group / feedback sessions**
- Course correction** (i.e., assess and adjust)

## 5. Determine what success looks like

All Approved Email activity is tracked, so you can set goals and measure progress regularly. Establish ramp-up goals for the first few weeks, typical of any new application, and goals for when you reach a steady state.

Category	Ramp-up Goals	Steady-state Goals
Volume of emails		
Content usage		
HCP engagement rates (open and click-through)		