

Veeva Vault CRM Events Management

# Speaker Management Innovation Guide



# Overview

Establishing and maintaining strong relationships with expert speakers is crucial in delivering impactful events. When teams are bogged down by the complexities of managing speaker data, focusing on the event experience is harder.

The Speaker Management capabilities of Veeva Vault CRM Events Management automate many administrative tasks involved. It provides specialized tools that centralize and organize speaker information, reduce manual effort, and minimize errors.

All data are stored in Veeva Vault CRM to give a complete picture across engagement channels.

## Speaker Management Key Takaways



Streamlines process throughout the entire speaker management lifecycle.



Ensures compliance and budget adherence.



Benefits multiple teams across the organization.

## Helping Biopharma Teams and Speakers

### Event organizers can:

- Access detailed speaker information: recent events, training history, speaker utilization rates, and spending caps.
- Nominate accounts to become new speakers, or renominate existing speakers to be qualified to speak on additional topics.
- Store and manage contracts, including services and rates, in a centralized system.
- Filter speakers by training, qualifications, and contracted services.
- Link speakers to accounts for consistent management and formatting.
- Schedule speakers for future events based on eligibility and cap status for the next year.

### Compliance and legal departments can:

- Apply mandatory filters during speaker selection to ensure only eligible speakers are chosen.
- Centralize speaker contracts to maintain contractual obligations and streamline audits.

### Speakers can:

Access the Speaker Portal to:

- View upcoming and past events.
- Download active and expired contracts.
- Prepare for upcoming events with available resources.

## SPEAKER PORTAL – EVENTS

The Speaker Portal is enabled and managed within Vault CRM and is included in the Events Management license. Each CRM organization has its own dedicated Speaker Portal. Biopharma can customize the Speaker Portal with its logo, support contact information, privacy policy, and terms of use. Configurations can be done without Professional Services support.

**Events**

**Upcoming Events**

**12 FEB** **Medical Education Event**  
Natevba • Natevba Efficacy  
Organizer - Linda Blackburn

**Date and Time**  
12 Feb 2025 · 17:00  
12 Feb 2025 · 18:00 Central European Standard Time

**Location**  
Elite Spire Hotel  
9880 Manor Road  
London, United Kingdom SK14 7ML

**Key Contact**  
None

**5 FEB** **Medical Education**  
Natevba • Natevba Efficacy  
Organizer - Linda Blackburn

**Date and Time**  
5 Feb 2025 · 12:00  
5 Feb 2025 · 13:00 Central European Standard Time

**Location**  
Elite Spire Hotel  
9880 Manor Road  
London, United Kingdom SK14 7ML

**Key Contact**  
None

**31 JAN** **Natevba Efficacy**  
Natevba • Natevba Efficacy  
Organizer - Daphne Rios

**Date and Time**  
31 Jan 2025 · 17:35  
31 Jan 2025 · 18:35 Central European Standard Time

**Location**  
Elite Spire Hotel  
9880 Manor Road  
London, United Kingdom SK14 7ML

**Key Contact**  
None

**31 JAN** **Natevba Efficacy**  
Natevba • Natevba Efficacy  
Organizer - Daphne Rios

## SPEAKER PORTAL – CONTACTS

**Events**

**Contracts**

**Active Contracts**

**Service Engagement Contract Tier 1 2025**  
Service Engagement Contract Tier 1 2024  
Signed: 9 Jan 2025  
1 Jan 2025 - 31 Dec 2025

**Download**

**Tier 1: Natevba MSA Speaker Contract**  
Tier 1 Speaker agreement bureau  
Signed: 11 Feb 2025  
1 Jan 2023 - 31 Dec 2053

**Download**

**Expired Contracts**

# Speaker Management Features Help Field-Led Events by:

## 1. Storing Speaker Information in CRM

Each speaker can be linked to an account, allowing for seamless data integration.

When linked, the speaker's name is automatically formatted to match the associated account, ensuring consistency across the platform.



Not all speakers need to be tied to an account. Speaker details can be manually entered, adhering to a standardized naming convention for easy searchability.

## 2. Keeping Accurate Training Records

Speakers train on key topics, which are cataloged for selection. Documented training links speakers to topics, ensuring organizers can filter and choose qualified candidates.



Users can select a topic and filter speakers accordingly. Only those trained on the selected topic will be displayed.

## 3. Meeting Contractual Obligations

Events Management includes a module for handling speaker contracts, which details the services a speaker is expected to provide and the associated rates.

All contractual data is stored in one place, making it easier to track the services rendered and the financial terms agreed upon. When a contract is activated, relevant details are automatically updated in the speaker's profile, giving a complete overview of their qualifications and contracted services.

## 4. Tracking Speaker Utilization and Caps

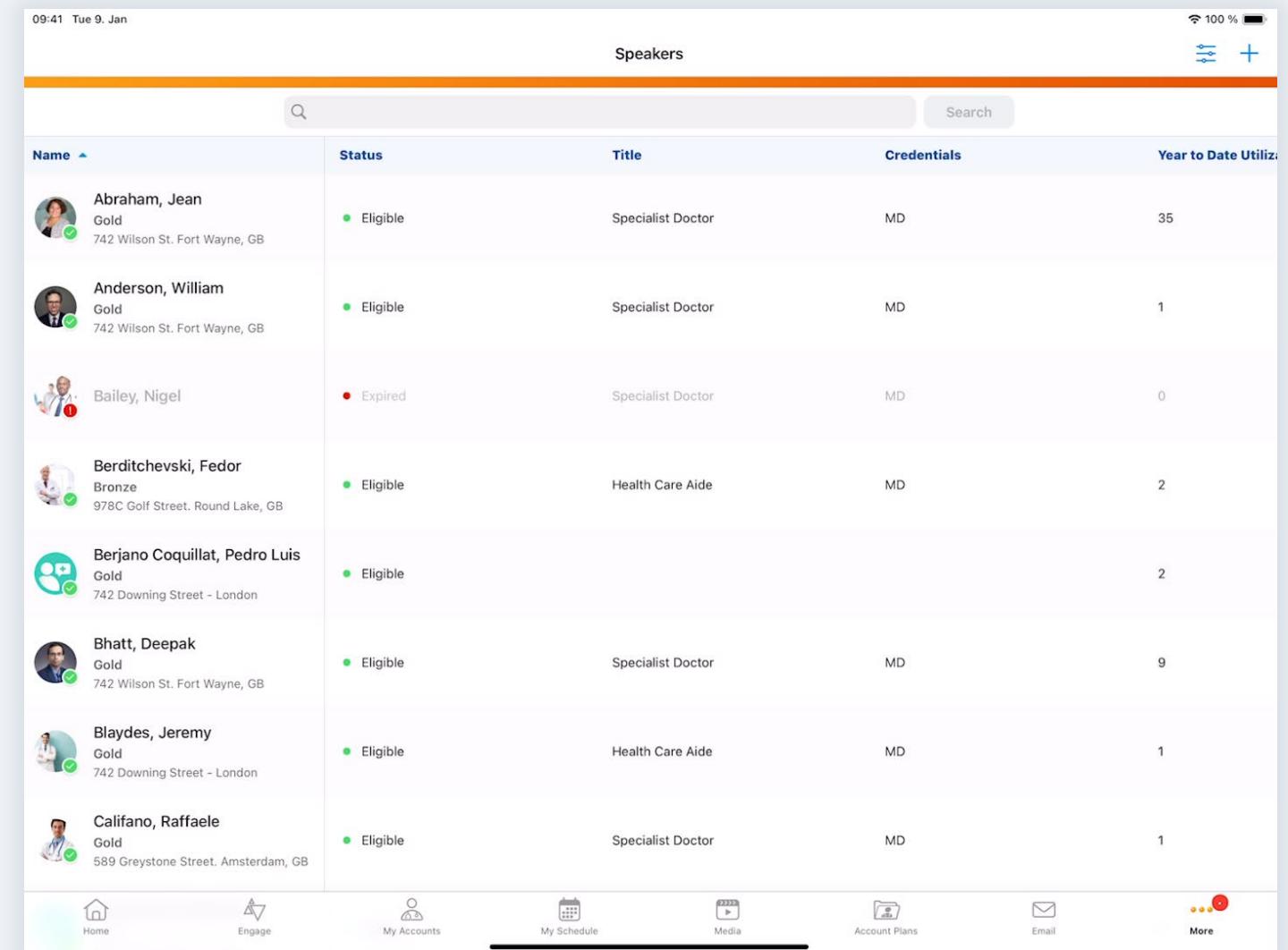
Each time a speaker is engaged for an event, their utilization metrics are updated. This process includes monitoring their annual cap (the maximum value of services they can provide within a year).

The system can automatically reset these values at the beginning of a new year, ensuring that all records reflect the current utilization and spending limits.



This feature is particularly useful in managing speakers across multiple regions with varying compliance requirements.

## SPEAKER NOMINATIONS



The screenshot shows a table titled 'Speakers' with the following data:

Name	Status	Title	Credentials	Year to Date Utilization
Abraham, Jean Gold 742 Wilson St. Fort Wayne, GB	Eligible	Specialist Doctor	MD	35
Anderson, William Gold 742 Wilson St. Fort Wayne, GB	Eligible	Specialist Doctor	MD	1
Bailey, Nigel Bronze	Expired	Specialist Doctor	MD	0
Berditchevski, Fedor Bronze 978C Golf Street. Round Lake, GB	Eligible	Health Care Aide	MD	2
Berjano Coquillat, Pedro Luis Gold 742 Downing Street - London	Eligible			2
Bhatt, Deepak Gold 742 Wilson St. Fort Wayne, GB	Eligible	Specialist Doctor	MD	9
Blaydes, Jeremy Gold 742 Downing Street - London	Eligible	Health Care Aide	MD	1
Califano, Raffaele Gold 589 Greystone Street. Amsterdam, GB	Eligible	Specialist Doctor	MD	1

Below the table are navigation icons: Home, Engage, My Accounts, My Schedule (selected), Media, Account Plans, Email, and More.

## 5. Speaker Planning for the Future

Events Management allows event organizers to consider speakers for future events even if they have reached their cap for the current year. This forward-looking approach ensures that speakers can be booked well in advance, aligning with strategic goals and maintaining a consistent flow of expertise across events.

## 6. Keeping Accurate Training Records

Many compliance rules apply to speaker selection. For example, speaker selection may be limited to speakers with certain training, or with certain contracts in place. The flexible filtering system can be tailored to meet the needs of different event types and regions too.



Use the **Speaker Nomination** feature to facilitate the speaker creation and nomination process for end users.

Filtering speakers ensure that only those who meet specific qualifications are selected for events. These filters are based on several criteria:

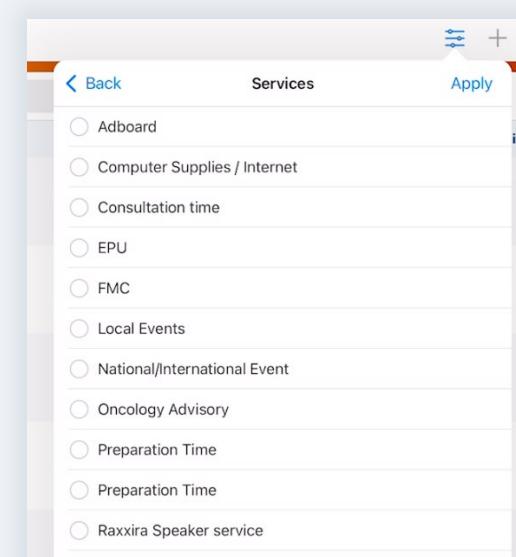
- General training – for example, compliance or speaking training.
- Topic training – training to speak on a specific topic, such as product usage.
- Contracted services.

The filters are categorized into three types:

- Mandatory: Automatically applied and cannot be removed.
- Optional On: Automatically applied but can be removed if necessary.
- Optional Off: Not applied by default but can be added manually.

Filters are defined in the Event Rules.

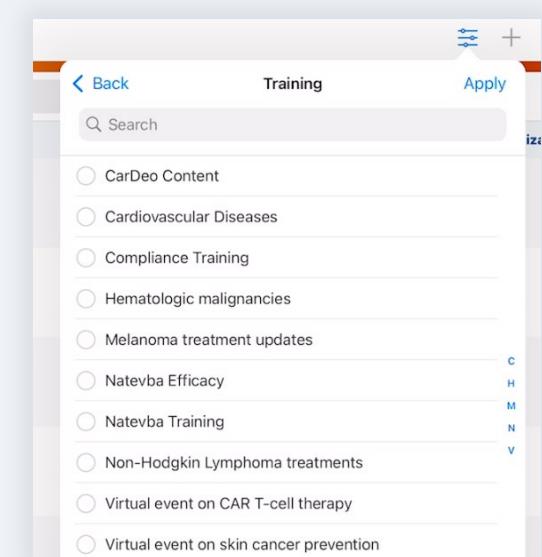
### FILTER BY SERVICES



The screenshot shows a list of service categories:

Services
Adboard
Computer Supplies / Internet
Consultation time
EPU
FMC
Local Events
National/International Event
Oncology Advisory
Preparation Time
Preparation Time
Raxxira Speaker service

### FILTER BY TRAINING



The screenshot shows a list of training categories:

Training
CarDeo Content
Cardiovascular Diseases
Compliance Training
Hematologic malignancies
Melanoma treatment updates
Natevba Efficacy
Natevba Training
Non-Hodgkin Lymphoma treatments
Virtual event on CAR T-cell therapy
Virtual event on skin cancer prevention



## 7. Applying Event Business Rules

Events Business Rules act as automatic guardrails to ensure event compliance and minimize planning mistakes. Speaker management examples of Event Business Rules include:

Speaker attendance by expense cap rule: Limits a speaker's attendance based on expense cap.

**“Warn organizers if committed expenses exceed 10% of the expense cap.”**

Per event speaker expense limit rule: Limits the expenses of an event that can be attributed to an event speaker.

**“Accommodation expense cannot be more than 300 EUR.”**

Per speaker engagement limit rule: Limits the number of events a speaker can speak at per event type.

**“Warn organizers if a speaker has already been confirmed on three other speaker programs.”**

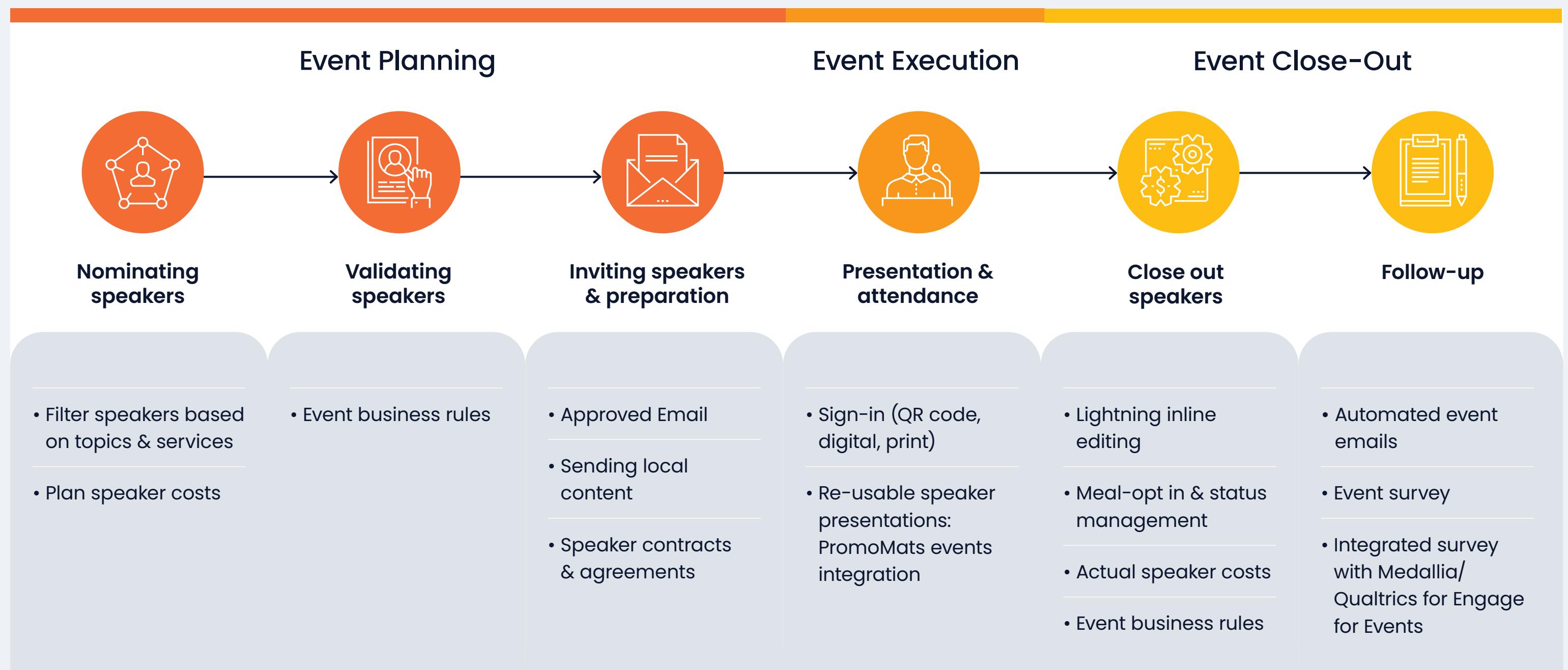
**Learn more about Event Business Rules.**



**Event Speaker Business Rules** allow you to introduce an additional level of compliance when validating your speakers.

### SPEAKER EVENT RULE

# Speaker Management Across the Event Lifecycle



## Keep Learning

- ↗ [Veeva Help - Speaker Management](#)
- ↗ [Demo: Events Management Speaker Tab](#)
- ↗ [Demo: Events Management - Speaker Contracting](#)

↗ **Get expert guidance on how to start using Speaker Management.**

### ABOUT US

Veeva is the global leader in cloud software for the life sciences industry. Committed to innovation, product excellence, and customer success, Veeva serves more than 1,100 customers, ranging from the world's largest biopharma companies to emerging biotechs. As a Public Benefit Corporation, Veeva is committed to balancing the interests of all stakeholders, including customers, employees, shareholders, and the industries it serves.

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