



INNOVATION GUIDE
MyInsights

Veeva CRM

Overview

Veeva CRM MyInsights enables a CRM user experience that's tailored for your teams, helping them make data-driven decisions that drive more effective engagements.

Your instance of **Veeva CRM** should be as unique as your business, and **Veeva CRM MyInsights** can help you make that happen. CRM MyInsights lets you craft custom screens, workflows, and app-like experiences inside the Veeva CRM interface, so you can put the data and functionality that power your team at their fingertips.

You can create screens using either configuration or code. CRM MyInsights Studio allows administrators to architect and deploy screens to any Veeva CRM org they manage with a codeless point-and-click interface. For more advanced use cases, developers can use industry-standard HTML5 and JavaScript to craft personalized user experiences.



Tips & Tricks

PUT ALL THE DATA THAT POWERS YOUR TEAMS IN ONE PLACE

CRM MyInsights features an array of connectors and integration tools that make it easy to funnel data from both internal and external sources directly into Veeva CRM. Your teams won't have to waste time switching between apps or searching for the right metrics when it's already right where they do their best work.

Surface real-time CRM data for more relevant actions

Maybe you want to show your sales reps the healthcare professionals (HCPs) they've called on the fewest times this quarter or help medical teams see an HCP's most recent medical inquiry before they go in for a chat.

A widget from a CRM MyInsights screen showing a user's most-seen and least-seen accounts.

Top Seen Accounts	
Account Name	Call Count
Difilippo, John	20
Abbate, Marc	18
Aarons, Darryl	7
Aaron, Michael	6
Hudis, Clifford	6

At Risk Accounts	
Account Name	Call Count
Jones, Sally	0
Teicher, Mark	0
Green, Jeff	0
Acosta, Robert	0
Admani, Irfan	0

Metrics like these rely on data that's already stored in Veeva CRM. CRM MyInsights' built-in query system pulls CRM data into custom screens in real time. Once a field rep logs a call or sends an email, any metrics that depend on these data points will update automatically so your teams always see the most accurate account and activity data.

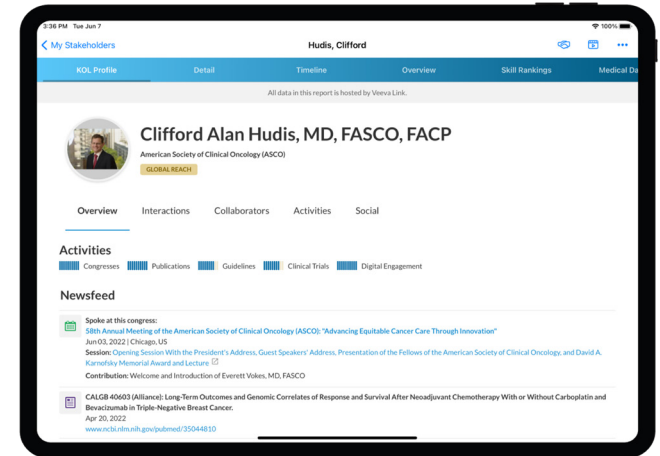


Tips & Tricks

Use prebuilt connectors to easily query data from Veeva Commercial Cloud

Pull in data from the rest of **Veeva Commercial Cloud** where it'll help your teams make better decisions. Prebuilt connectors for **Veeva Nitro**, **Veeva Link**, and other Veeva solutions enrich your CRM MyInsights screens with detailed insights on who to talk to and what to talk about.

Whether you're looking to serve up a report on territory sales data, a preview of a KOL's Twitter feed, or updates on the newest patient leads, CRM MyInsights provides a window to the other parts of the Veeva Commercial Cloud outside of Veeva CRM. With these prebuilt connectors, the data you need will flow seamlessly into Veeva CRM without any manual data loads or data inconsistencies between systems.

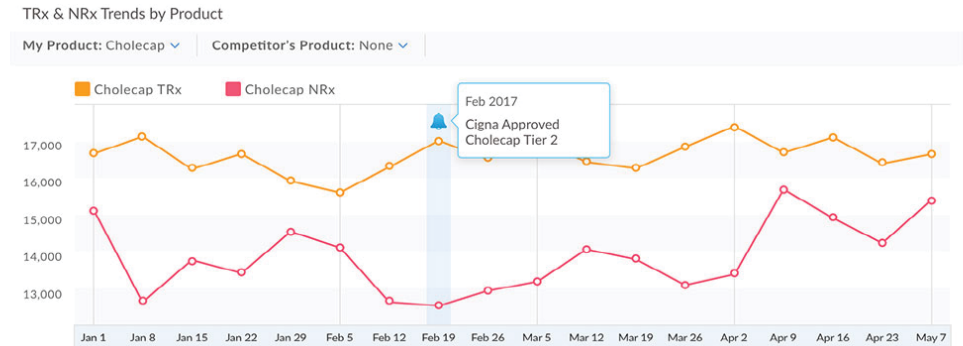


A CRM MyInsights screen showing a KOL's Veeva Link profile.

Connect external tools and data through third-party integrations

Have a Tableau dashboard that you want your reps to look at before calls? What about some custom KPIs from your own data warehouse? Or maybe there are some metrics from non-personal promotions that your reps should check on before each conversation?

A widget from a CRM MyInsights screen showing prescription data.



CRM MyInsights helps you put all of that into Veeva CRM. With a developer kit that supports third-party APIs, CRM MyInsights lets your developers build custom integrations to applications and data sources outside of Veeva Commercial Cloud. This way, you can bring the full extent of the insights that your field teams need into the app they use every day.



Tips & Tricks

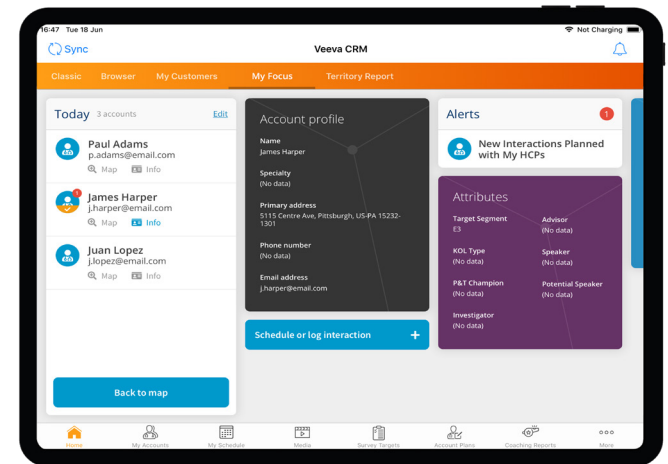
BUILD A CRM EXPERIENCE THAT'S AS UNIQUE AS YOUR TEAMS

You don't bring treatments to market the way anyone else does, and your teams don't work the way other companies do. That's why CRM MyInsights gives you the flexibility to craft a personalized workspace tailored for your brand strategy and the way your teams like to get things done.

Tailor the experience with a wide array of display options

The CRM MyInsights screen supports a variety of visualizations and display elements to help you create intuitive, user-friendly experiences. CRM MyInsights screens are built on the same HTML5 and JavaScript that powers the webpages and apps you use daily, giving you the freedom to present your insights using whatever visual language appeals to your team the best.

Not sure if you want a bar graph or a line chart to display your total territory scripts? CRM MyInsights lets you try both. Or insert a pop-up box that your teams can click open for helpful reference information. Maybe you want a network mapping that shows all hospitals within a healthcare organization (HCO) or even an emoji that changes based on the status of an account. You're limited only by your creativity and business logic.



A CRM MyInsights screen that displays widgets in a column layout.

Build a command center by integrating your favorite field productivity tools

From route planners to patient portals, bring it all into Veeva CRM so your teams don't have to switch back and forth between the apps they need. CRM MyInsights has a set of robust developer tools that are compatible with any REST API, letting you incorporate the apps your teams use for customer engagement directly into the Veeva CRM interface.

Whether you want to interact with an AI assistant side-by-side with territory call history or view a business intelligence dashboard next to sampling activity, CRM MyInsights can make it happen.



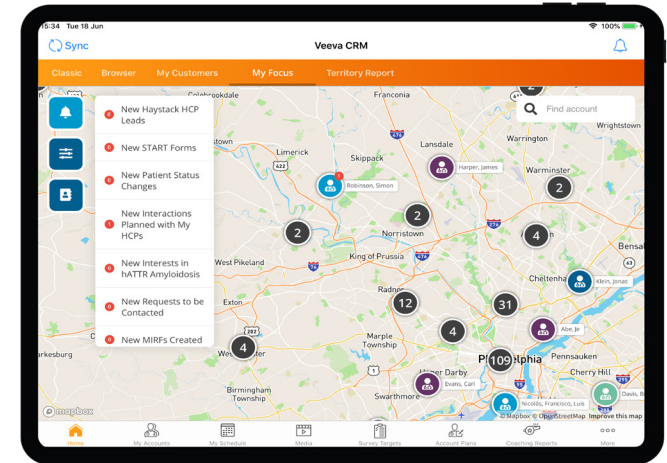
Tips & Tricks

Develop your own app-like experiences directly in Veeva CRM

Think Nextdoor, but for large health systems. Pinterest, but for your educational content. DoorDash, but for sample requests. If you have a brilliant idea for an app that could help your field, don't wait for someone else to build it—CRM MyInsights provides a set of robust platform features to help your developers create app-like experiences in Veeva CRM.

CRM MyInsights is designed to give developers the freedom to work however they're most comfortable, with support for all modern front-end web frameworks. So whether your developers prefer React, Angular, Vue.js, or something else, they can hit the ground running in CRM MyInsights.

The CRM MyInsights API allows developers to access and manipulate data just as Veeva CRM does. This means that your developers can reshape the workflow of tasks in Veeva CRM using custom CRM MyInsights screens and build the flow that helps your teams achieve the most.



A CRM MyInsights screen that displays a map to help field teams plan their route for the day.

DRIVE PRODUCTIVITY WITH ACTION PROMPTS EMBEDDED IN VEEVA CRM

When it comes to customer engagement, the right timing is everything—which is why you can build prompts for action into CRM MyInsights screens, helping your teams make the right moves at the right times. That way, you can reduce the number of process steps to get things done and make the right actions the path of least resistance in Veeva CRM.

Send updates and to-dos with CRM Suggestions

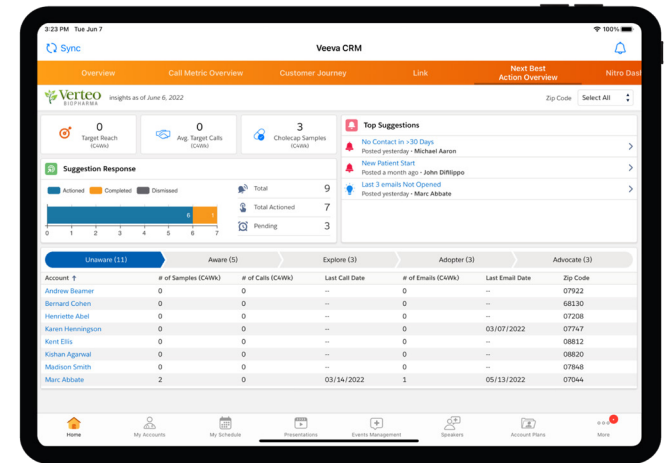
Today's customer engagement teams operate in a complicated world. They have access to more data from more sources than ever before amid constantly changing field conditions. Veeva CRM Suggestions let you deliver the signal through the noise as notifications in the Veeva CRM app. Suggestions are included in Veeva CRM's core functionality and embedded in the user interface.

Tips & Tricks



CRM MyInsights supports actions against the Suggestions data model so you can display Suggestions in CRM MyInsights screens for your field teams to act on. From a CRM MyInsights screen, it's only a few clicks for your teams to open a Suggestion and start a call, Engage Meeting, or Approved Email.

And with CRM MyInsights' flexible display options, you can present your Suggestions however you want—a checklist, a calendar, a Kanban board, or whatever format helps your teams most.



A CRM MyInsights screen that includes a widget for a sales rep's Suggestions in the field.

Watch a CRM MyInsights Suggestions use case **in action**.

Get your teams where they need to be with Smart Links

CRM MyInsights allows you to customize your navigation flow in Vevea CRM, so anything your teams need is always within reach. The Smart Link feature allows you to make custom links in CRM MyInsights screens that can take users to view a record, create a record, or start an action with just a tap.

This way, if you want to show the sales reps a table of the HCPs they've called on the least, you can make each HCP name a Smart Link so the rep can start a call right away. Or if you want to show the list of HCOs that have the most sales and then link each HCO to its account plan, Smart Links can do that too.

Smart Links cover a wide range of Vevea CRM objects, from Approved Emails to Events and CLM presentations, so your teams can spend less time switching screens and more time getting work done.

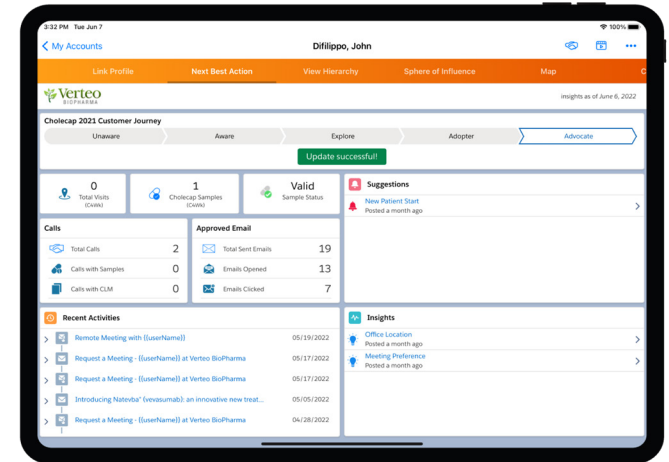


Tips & Tricks

Update Veeva CRM data with Inline Edit

Sometimes your teams need to edit some data in Veeva CRM: maybe they're moving a customer to a different stage in a customer journey, adding details to an order, or changing the strength of an affiliation between an HCP and her Ph.D. advisor. Using CRM MyInsights, you can provide them an opportunity to make that edit without interrupting their workflow.

CRM MyInsights' Inline Edit feature gives you the ability to create custom prompts for editing Veeva CRM data right into CRM MyInsights screens. Any object in Veeva CRM can be edited this way, including custom objects that your admins may have built for your business, so you can capture data from your teams wherever it makes the most sense.



A CRM MyInsights screen that allows field teams to move an HCP from one stage in the customer journey to another.

Getting Started

IMPLEMENT YOUR IDEAS WITH A VARIETY OF OPTIONS

CRM MyInsights Studio

Want the flexibility of CRM MyInsights without the code? CRM MyInsights Studio is a no-code configuration tool that comes with every CRM MyInsights license. A point-and-click interface enables you to construct business logic for your data and craft personalized user experiences with bespoke functionality.

On top of this, Studio also has a set of creator tools that make it easy to test and debug your screens. The preview feature pulls live data from Veeva CRM and Veeva Nitro so you can check that the calculations you've configured give you the correct values. Detailed error messages and debug logs show you where errors occur to help you catch bugs before your field users do.

CRM MyInsights Studio also helps streamline the deployment of CRM MyInsights screens to Veeva CRM orgs. In Studio, you can manage different versions of a screen, see all the places it has deployed to in your org, and deploy the same screen to multiple user profiles with just a click.

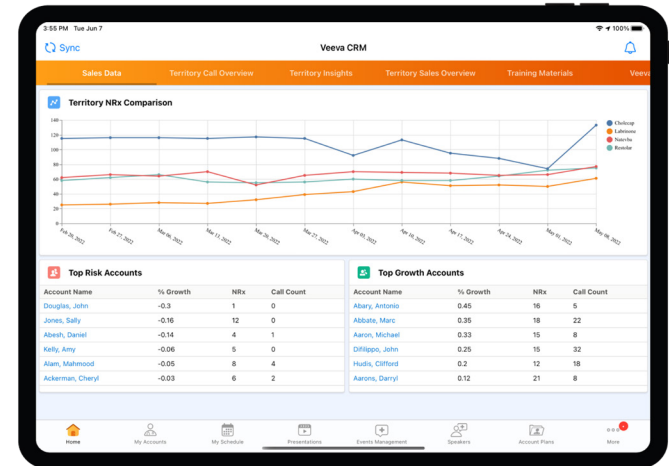
Studio is designed for anyone who has a thorough understanding of the Veeva CRM data model and is familiar with Salesforce or Excel reports—giving your Veeva CRM admins the power to shape the software for your business process.

CRM MyInsights Custom

For those looking to experiment with the full range of CRM MyInsights features, the custom code approach is the way to go. More advanced functionality, such as integrating third-party applications or complex app-like user interfaces, requires custom code.

The CRM MyInsights code platform is easy for any seasoned web developer to pick up. It supports industry-standard HTML5 and JavaScript and follows general web development principles, giving developers the freedom to use the same coding setup, frameworks, and libraries that they're used to.

Useful debugging functions make it easy for developers to get to the bottom of any issues with the screens they build, giving them the support they need to explore the endless possibilities of a CRM MyInsights screen.



A CRM MyInsights screen created in CRM MyInsights Studio.

Getting Started

CRM MyInsights Services and Partners

If you're looking for a little extra help with CRM MyInsights, the good news is that you're not alone. Veeva's Professional Services team and CRM MyInsights partners are here to provide their expertise throughout the entire screen creation process, from initial wireframes to post-project change management.

Our experienced services teams and partners are technical and process experts who have worked with a variety of customers. They not only design and code custom screens but also work with you to architect the best CRM MyInsights approach for your business.

See our CRM MyInsights-certified services partners on our [partners page](#).



Resources

Demo

- [Veeva CRM MyInsights: Crafting a More Tailored User Experience](#)

Product Brief

- [Veeva CRM MyInsights Datasheet](#)

Documentation

- [MyInsights Overview](#)
- [MyInsights Studio](#)
- [MyInsights Developer Reference](#)

Customer Stories

- [Empowering Alnylam's Multichannel Field Teams with Data-driven Insights](#)

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