

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.

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.

SPEAKER PORTAL – EVENTS

SPEAKER PORTAL

For assistance email email@domain.com or call 555-555-5555

Events

Contracts

Upcoming Events

Past 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

SPEAKER PORTAL

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Events

Contracts

Active Contracts

Expired 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

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.

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.

SPEAKER NOMINATIONS

09:41 Tue 9. Jan

Speakers

Name	Status	Title	Credentials	Year to Date Utiliz
 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	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

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☐ 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

Vault CRM

Person Accounts

Search Person Accounts

SC Master CRM - EU

Business Admin

Objects

Picklists

Templates

Objects > ER-0000000031

Speaker Service: T-0000000010 Active

Details

Speaker Qualifications (2)

Event Rules (1)

System Information

Attachments (0)

Name T-0000000010

VSPA_country_code

EM Catalog Name Local Event

EM Catalog Status Approved

Description Required qualification for Local Events

EM Catalog Type Speaker Service

Country Code

Speaker Qualifications

+ Create

Show in Tab

1-2 of 2

Name	Speaker	Created Date
SQ-0000000004	Allen, Richard	17/02/2025 14:23 WET
SQ-0000000005	Allen, Richard	18/02/2025 08:48 WET

Event Rules

+ Create

Show in Tab

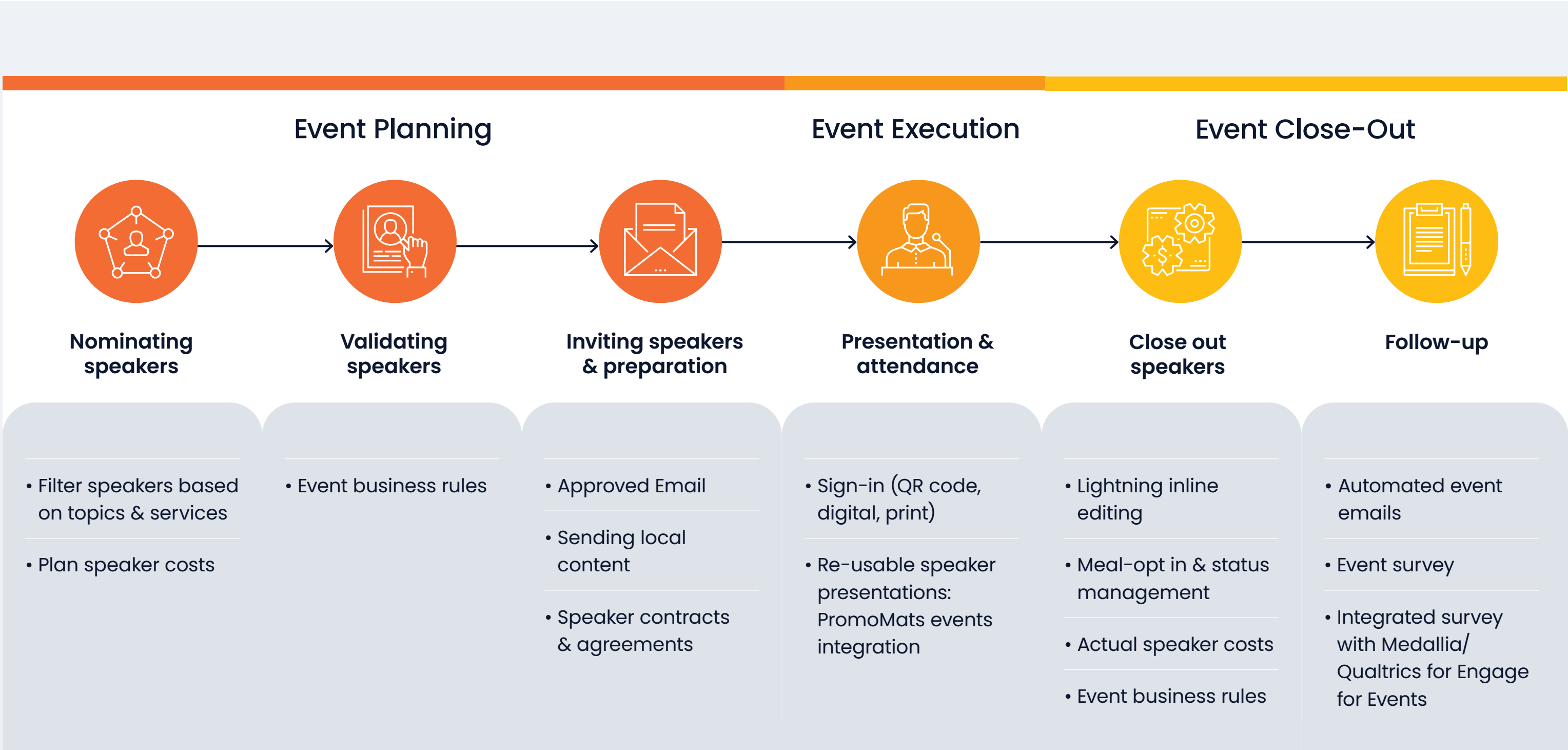
1-1 of 1

Name	Event Configuration	Event Rule Type
ER-0000000031	EC-0000000001	Speaker Qualification


System Information

Attachments


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.



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