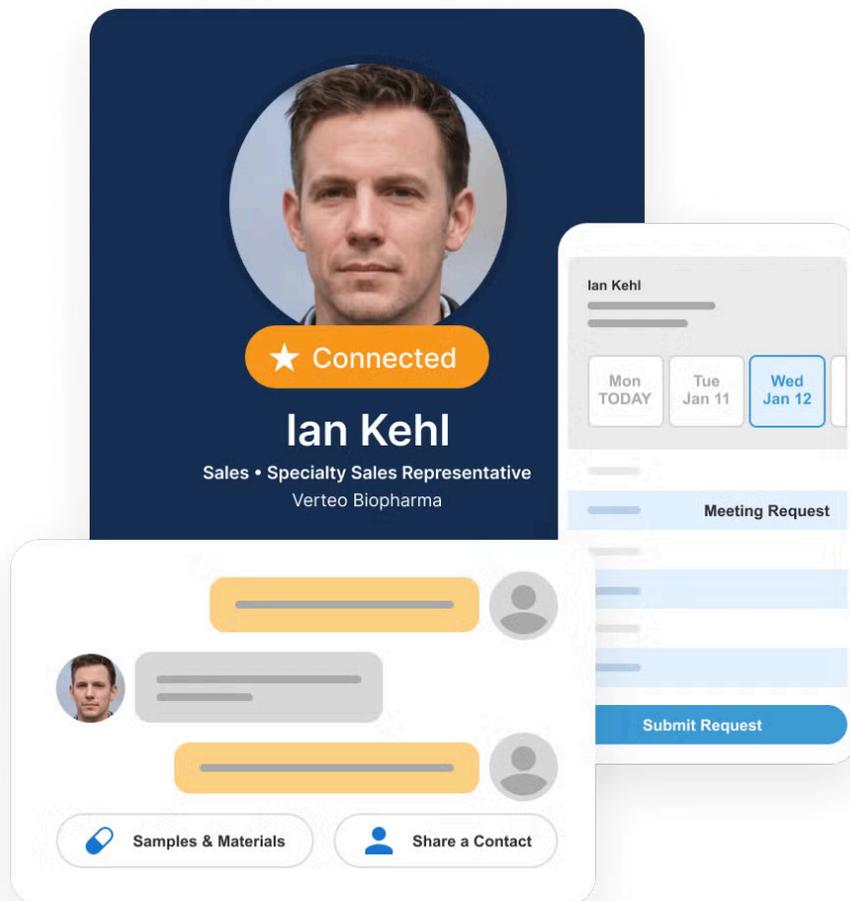


Veeva Engage: Digital HCP Engagement for Pharma and Life Sciences

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Veeva Engage: Digital HCP Engagement for Pharma and Life Sciences

Veeva Engage is a cloud-based platform that enables pharmaceutical and life sciences companies to interact with healthcare professionals (HCPs) through compliant digital channels. As part of Veeva's customer relationship management (CRM) suite, Engage provides a **global solution for reps and HCPs to meet, connect, and share information beyond traditional face-to-face visits**. Designed specifically for the life sciences industry, it allows **medical sales representatives and medical science liaisons (MSLs)** to deliver content and communicate with doctors in a secure, regulated environment, while giving **HCPs a convenient one-stop access point** for information and support. All interactions – from chats to virtual meetings – are automatically captured in the CRM system for a complete engagement history ([Veeva Vault CRM Engage | The Digital HCP Engagement Solution | Veeva](#)), ensuring compliance and a 360° view of customer activity.

Key Features and Capabilities

Veeva Engage offers a rich set of features tailored to the needs of pharmaceutical field teams and HCPs. Its capabilities span scheduling, virtual meetings, messaging, content distribution, sample management, and e-signatures – all with built-in compliance controls. **Major features include:**

- **HCP-Centric Scheduling:** Reps can check an HCP's availability and preferences and request meetings directly through Engage ([Link](#)). **HCPs are empowered to set their communication preferences** (e.g. preferred channels or office hour policies), control their availability, and even block out times ([Link](#)). These preferences flow into the rep's scheduling interface in real time, ensuring meetings are arranged at suitable times and via the HCP's channel of choice ([Link](#)).
- **Remote Meetings (Virtual Calls):** Engage provides an integrated video conferencing solution for **one-on-one or group meetings** with HCPs. Reps can **send meeting invitations and launch secure video calls with just a few clicks** ([Link](#)). The platform leverages embedded Zoom technology to deliver high-quality, real-time video communications within a compliant framework ([Veeva Brings Together Real-time Collaboration](#)). During an Engage remote meeting, reps can share approved presentation content (CLM content) on-screen, with **automated tracking of what content was shown and for how long** ([Link](#)). Meetings can also be optionally recorded (if enabled by the company) for compliance. This seamless virtual meeting experience expands rep reach to HCPs who prefer digital interaction or are in hard-to-visit locations, **while maintaining enterprise-grade security and compliance** ([Veeva Brings Together Real-time Collaboration](#)).
- **Compliant Chat Messaging:** Engage includes a two-way chat feature that allows **secure text messaging between field teams and HCPs** ([Veeva Unveils Powerful New Digital Tools to Enable the Future of On-demand Physician Engagement | Veeva](#)) (<https://www.veeva.com/resources/veeva-unveils-powerful-new-digital-tools-to-enable-the-future-of-on-demand-physician-engagement/#:~:text=%2A%20Compliant%2C%20two,calls%20directly%20from%20the%20app>). This "chat" is asynchronous, meaning HCPs can send a request or question at any time, and reps respond when available – enabling more timely exchanges in between scheduled visits. The chat is **fully compliant and monitored**: HCPs do not need to download any special app to use it (they can access it via the Engage web or mobile app directly), and all messages are captured to the CRM with an audit trail ([Link](#)). Reps can thus **strengthen relationships by responding quickly to inbound questions or requests** ([Link](#)). (For example, if a physician messages a question about a drug or requests a resource, the rep can answer within minutes.) Companies can configure controls on this channel – for instance, to monitor text for non-compliant language or to disable HCP-initiated chat if desired – ensuring that all dialogue stays within regulatory guidelines ([Veeva Vault CRM Engage | The Digital HCP Engagement Solution | Veeva](#)). Notably, early adopters have seen that about **30% of Engage conversations are initiated by HCPs** themselves via chat, indicating the channel's usefulness in allowing HCPs to pull information on-demand ([Link](#)).

- **Approved Content Sharing:** The platform makes it easy to **share scientific and promotional content** with HCPs through digital channels in a controlled way. Reps can send **pre-approved materials (like brochures, slide decks, patient education) over chat or email as trackable links (Link)**. Every content piece is managed through Veeva's content management system (Vault PromoMats/MedComms) and is **"Med Legal" approved, ensuring only compliant content is distributed**. When an HCP clicks a content link, that action is logged – providing valuable metrics such as open rates and time spent on the material. Engage's data shows extremely high engagement with content delivered via these channels (e.g. an ~90% open rate on chat-shared content) ([Veeva Vault CRM Engage | The Digital HCP Engagement Solution | Veeva](#)), likely because the content is delivered when the HCP requested it. This feature also extends to **on-demand resource libraries:** HCPs can proactively find or request materials through their Engage app, effectively pulling the content they need when they need it ([[Veeva Unveils Powerful New Digital Tools to Enable the Future of On-demand Physician Engagement | Veeva](#)] (<https://www.veeva.com/resources/veeva-unveils-powerful-new-digital-tools-to-enable-the-future-of-on-demand-physician-engagement/>)).
- **Sample Requests and Ordering:** Engage supports digital management of sample requests, aligning with the stringent controls around pharmaceutical sampling. Through the chat or portal, **HCPs can request product samples** or literature, and reps are notified instantly ([[Veeva Unveils Powerful New Digital Tools to Enable the Future of On-demand Physician Engagement | Veeva](#)] (<https://www.veeva.com/resources/veeva-unveils-powerful-new-digital-tools-to-enable-the-future-of-on-demand-physician-engagement/>)). The rep can then process the sample request via the CRM's sample management workflow. All sample requests made through Engage are documented, and if a sample is delivered, Engage can facilitate capturing the HCP's signature electronically (see next feature). This speeds up response time – as one commercial director noted, *"Engage allowed reps to respond more quickly to HCP requests for patient resources, content, or samples."* ([Boehringer Ingelheim: Field HCP-Centric Engagement | Veeva](#)). It provides a **convenient, compliant way for doctors to get samples** without waiting for the next in-person visit, and all transactions remain within the approved system of record.
- **Remote Signature Capture:** For activities that require HCP signatures – such as sample receipts, opt-in confirmations, or other regulated acknowledgments – Veeva Engage offers integrated **electronic signature capture**. During a remote meeting, a rep can prompt the HCP to sign digitally on their screen with an intuitive interface, just as they would on a tablet during an in-person call ([Link](#)). Alternatively, the rep can send a **secure link for the HCP to provide a signature at any time** (for example, to acknowledge sample delivery after a call) ([Link](#)). These signatures are captured in compliance with 21 CFR Part 11 requirements (electronic records and signatures) and are tied back to the appropriate record in the CRM. This feature ensures that even in a fully virtual engagement, **critical compliance documentation (like sample sign-off) is completed "paperlessly" and stored audit-ready**.

All of these capabilities are **fully integrated within the Veeva CRM environment**, meaning that whether an interaction happens via a video meeting, a chat message, or content link click, it is recorded centrally. The home office (e.g. sales operations, medical affairs, or compliance teams) gets a **complete, unified view of each HCP's engagement across channels (Link)**. This multichannel integration allows for robust analytics and follow-up: for instance, a rep can see that Dr. Smith attended a remote meeting last week and also downloaded two resources via Engage, before planning the next action.

Technical Architecture and Integration Details

Veeva Engage is built exclusively for life sciences needs, on a robust cloud infrastructure that emphasizes security, compliance, and seamless integration with other Veeva systems:

- **Veeva Vault CRM Integration:** Engage is delivered as an add-on module to Veeva CRM (specifically now part of **Vault CRM** on Veeva's own Vault platform) ([Veeva Vault CRM Engage | The Digital HCP Engagement Solution | Veeva](#)). End users (reps and MSLs) access Engage features from within their standard Veeva CRM interface – for example, an iPad or web CRM app that now has scheduling, chat, and meeting functions built-in. HCPs participate via a separate application (the **Veeva Engage mobile app or web portal**) that is purpose-built for them ([Veeva Vault CRM Engage | The Digital HCP Engagement Solution | Veeva](#)). All data flows into the CRM: an Engage video call is logged as a call record with details, chat transcripts are stored and associated with the customer's record, and content link clicks or sample requests generate corresponding activities. Because of this tight integration, **field teams and headquarters get real-time visibility into engagement data** without manual data entry – interactions are automatically captured in the CRM timeline ([Veeva Vault CRM Engage | The Digital HCP Engagement Solution | Veeva](#)). The CRM integration also means Engage can leverage existing customer data (territories, specialties, affiliations) and feed engagement metrics into analytics or next-best-action engines.
- **Embedded Video Conferencing (Zoom & Teams):** Rather than reinventing video technology, Veeva strategically **partnered with Zoom** to embed its video conferencing capabilities into Engage Meeting ([Veeva Brings Together Real-time Collaboration](#)) ([Veeva Brings Together Real-time Collaboration](#)). This best-of-breed approach means that when a rep starts a remote meeting, under the hood it utilizes Zoom's infrastructure – benefiting from its reliability, scalability, and security – but in a way that's seamless to the user (the HCP can join via a web client or their Zoom app, and the rep still gets all the compliance tracking) ([Joining an Engage Meeting via Zoom](#)). In fact, Veeva announced direct integration with both Zoom and Microsoft Teams, so that HCPs who prefer those platforms can join through their native app while **Engage retains control and captures the necessary data** ([Veeva Extends Remote Meeting Capabilities to Zoom and Microsoft Teams | Veeva](#)) ([Joining an Engage Meeting via Zoom](#)). The integration ensures features like waiting rooms, screen-sharing of approved content, and participant tracking are all handled within compliance. For example, if an HCP joins via a Zoom link, the system still logs their attendance and activity in Veeva CRM, even though they didn't join through the Engage web client ([Joining an Engage Meeting via Zoom](#)) ([Joining an Engage Meeting via Zoom](#)). This flexibility in infrastructure (Veeva's own web client or third-party video apps) gives HCPs choice in how they connect, **without compromising the compliant hosting and data capture** ([Joining an Engage Meeting via Zoom](#)).
- **Content and Data Ecosystem:** Engage is not a standalone point solution; it's part of Veeva's broader Commercial Cloud. It **ties into Veeva Vault PromoMats and MedComms** (content management systems for promo and medical content) to pull the latest approved materials for sharing ([Boehringer Ingelheim Makes Rapid Shift to Digital Engagement with Veeva CRM Engage Meeting | Veeva](#)). Reps always have up-to-date, compliant presentations and documents at their fingertips, and when they share content via Engage, it uses a Vault link that is **traceable and can even expire or be revoked if content is updated** – ensuring HCPs never see outdated or unapproved material. On the data side, Engage leverages Veeva CRM's customer master data (often enriched by **Veeva OpenData**) and can feed engagement metrics into Veeva's analytics tools. Veeva has **Veeva Pulse** data and reports, which aggregate engagement statistics across companies. These show benchmarks like response rates and channel effectiveness – for instance, Veeva Pulse has noted that content utilization is highest in meetings where reps leverage Engage's digital content sharing ([Veeva Pulse Reveals Digital Content More Than Twice as Effective ...](#)). All of this underscores that Engage is deeply woven into the life sciences commercial IT ecosystem, benefiting from **one unified platform for CRM, content, and analytics**.
- **Compliance and Security by Design:** Because it's built specifically for regulated industries, Veeva Engage includes numerous technical safeguards to meet compliance standards. **Every action in Engage**

is auditable – invitations, join times, chat messages, content shares, etc., are stamped with user, time, and stored in audit logs ([Veeva Vault CRM Engage | The Digital HCP Engagement Solution | Veeva](#)). There are even features for automatic **text monitoring**, where the system can flag or prevent certain keywords in chat (for example, if a rep attempted to discuss an off-label indication in writing, the company's compliance settings could block that message) ([Veeva Vault CRM Engage | The Digital HCP Engagement Solution | Veeva](#)). All communications are encrypted end-to-end, and the platform meets industry security standards (such as HIPAA and GDPR requirements for patient-related discussions, where applicable). The **use of trackable links and controlled content** means that if an HCP forwards a piece of content, the system still knows and can ensure it was approved for further distribution or not ([Link](#)). Veeva Engage's back-end is cloud-hosted (Veeva operates on leading cloud infrastructure with multi-tenant architecture for life sciences), and Veeva as a provider undergoes regular validation to ensure systems can be used in GxP and promotional compliance scenarios. Essentially, **compliance is the default setting of Engage**, which greatly reduces risk for pharma companies compared to generic communication tools ([Veeva Vault CRM Engage | The Digital HCP Engagement Solution | Veeva](#)).

- **Integration with CRM Processes:** Engage doesn't just log data to CRM; it also works with other CRM processes like call planning, territory management, and sampling workflows. For example, if an HCP uses Engage to request a meeting, that request can automatically generate a notification or even a placeholder call in the rep's call scheduling system. Similarly, **sample requests via Engage feed into the existing sample distribution and inventory control system** the pharma company uses (ensuring sample limits aren't exceeded and proper documentation is in place). Engage is also aware of compliance rules like only certain reps can detail certain products to certain doctors (per territory assignment or license status), and it respects those rules when connecting HCPs and reps. This tight integration with the CRM's business rules means Engage functions as an extension of the rep's normal tools – it's the same CRM data and workflows, just exposed to HCPs in a user-friendly way.

In summary, Veeva Engage's technical foundation is all about **leveraging robust cloud infrastructure and existing enterprise systems (CRM, content management, video conferencing) and unifying them into a single compliant platform** for HCP engagement. This gives companies a scalable solution (Veeva reports 100+ life sciences companies and over one million HCPs are on Engage globally ([Veeva Vault CRM Engage | The Digital HCP Engagement Solution | Veeva](#)) ([Veeva Unveils Powerful New Digital Tools to Enable the Future of On-demand Physician Engagement | Veeva](<https://www.veeva.com/resources/veeva-unveils-powerful-new-digital-tools-to-enable-the-future-of-on-demand-physician-engagement/#:~:text=capabilities%20at%20its%20European%20Veeva,million%20HCPs%20for%20digital%20meetings>))) without having to stitch together disparate tools and worry about compliance gaps.

Intended User Base and Roles

Veeva Engage is purpose-built for the pharma commercial and medical community. The key user groups include:

- **Pharmaceutical Sales Representatives:** The primary users on the industry side are field sales reps who promote drug products to HCPs. These reps use Engage to schedule appointments (in-person or virtual), conduct remote detailing sessions, chat with HCPs between visits, and send follow-up materials. For a sales rep, Engage is a way to **stay connected with their target physicians beyond the brief window of a traditional sales call**, allowing more frequent touchpoints. It also enables them to cover larger geographies effectively – for example, reaching lower-priority or remote clinics with virtual calls instead of rare in-person visits. Sales reps benefit from Engage by being more responsive (e.g. replying to a doctor's question quickly via chat) and by having all their interactions automatically recorded (which frees them from extra paperwork). The platform's ease of use – integrated into the iPad CRM app many reps already use – has made adoption relatively straightforward with proper training ([Driving HCP-Preferred](#)

[Engagement | Veeva](#) ([Driving HCP-Preferred Engagement | Veeva](#)). In fact, companies have found that once reps see Engage as a tool to help them **“be there 24x7” for their customers (virtually) without actually working around the clock, they embrace it as an extension of their role** ([Driving HCP-Preferred Engagement | Veeva](#)).

- Medical Science Liaisons (MSLs) and Medical Affairs Teams:** MSLs, who are field medical professionals focusing on scientific exchange (often with key opinion leaders and specialists), are another important user group. They use Engage in a similar way to reps but with a focus on medical content and inquiries. For example, an MSL can host a remote meeting to discuss latest clinical data with a physician or use chat to answer complex medical questions from HCPs in a compliant manner. Engage ensures that **MSL interactions remain non-promotional yet documented**, which is crucial for regulatory reasons. The quote from Boehringer Ingelheim underscores this dual usage: *“Veeva CRM Engage Meeting gives our medical sales reps **and** medical science liaisons a better way to connect with doctors and provide them with the information they need on new therapeutic options.”* ([Boehringer Ingelheim Makes Rapid Shift to Digital Engagement with Veeva CRM Engage Meeting | Veeva](#)). By using Engage, MSLs can quickly share approved scientific literature or slide presentations from medical congresses via the content sharing feature, for instance. Additionally, medical affairs managers at HQ can review transcripts of chats or Q&A to gather insights or ensure proper handling of any off-label questions (which if they occur, can be routed into medical inquiry workflows). Engage thus serves the needs of both commercial and medical field teams in one platform.
- Healthcare Professionals (HCPs):** The external end-users (customers) are physicians, pharmacists, nurses, and other healthcare providers who interact with life sciences companies. Engage is built to cater to HCPs’ preferences by giving them **control and convenience** in their dealings with pharma. Through the **Veeva Engage mobile app or web interface**, an HCP can *discover and connect with reps from different companies, send them messages, schedule or join virtual meetings, and access resources – all in one place* ([[Veeva Unveils Powerful New Digital Tools to Enable the Future of On-demand Physician Engagement | Veeva](#)](<https://www.veeva.com/resources/veeva-unveils-powerful-new-digital-tools-to-enable-the-future-of-on-demand-physician-engagement/#:~:text=%E2%80%9CWith%20Veeva%20Engage%20Connect%2C%20our,%E2%80%9D>)) ([[Veeva Unveils Powerful New Digital Tools to Enable the Future of On-demand Physician Engagement | Veeva](#)](<https://www.veeva.com/resources/veeva-unveils-powerful-new-digital-tools-to-enable-the-future-of-on-demand-physician-engagement/#:~:text=most%20importantly%2C%20sharing%20patient%20resources%2C%E2%80%9D,%E2%80%9D>)). This is a significant improvement over the old paradigm of phone tag and rep drop-in visits. Doctors can, for example, request a discussion about a new medication at a time that suits them by posting a meeting request via Engage, or they can quickly ask, “Do you have patient brochures for Drug X?” in a chat, rather than waiting weeks until a rep’s next visit. Importantly, Engage **does not expose the HCP’s personal contact info** to all reps; the communication stays within the app, which many HCPs appreciate for privacy ([[Veeva Unveils Powerful New Digital Tools to Enable the Future of On-demand Physician Engagement | Veeva](#)](<https://www.veeva.com/resources/veeva-unveils-powerful-new-digital-tools-to-enable-the-future-of-on-demand-physician-engagement/#:~:text=over%20one%20million%20HCPs%20for,digital%20meetings>)). With the **Engage Connect** network, HCPs even gain the ability to find support across multiple companies in the same app ([[Veeva Unveils Powerful New Digital Tools to Enable the Future of On-demand Physician Engagement | Veeva](#)](<https://www.veeva.com/resources/veeva-unveils-powerful-new-digital-tools-to-enable-the-future-of-on-demand-physician-engagement/#:~:text=%E2%80%9CWith%20Veeva%20Engage%20Connect%2C%20our,%E2%80%9D>)) – for instance, a clinic doctor could reach out to her reps from three different pharma companies through one interface. This cross-company aspect (HCPs proactively connecting with any participating company’s reps) is unique to Veeva’s approach and encourages HCPs to adopt the platform as a single hub for industry interactions. Ultimately, the intended outcome for HCPs is **faster access to information**,

services (like samples or patient programs), and expert contacts, on their terms. Over **one million HCPs worldwide were using Veeva Engage for digital interactions** by late 2021 ([Veeva Unveils Powerful New Digital Tools to Enable the Future of On-demand Physician Engagement | Veeva] (<https://www.veeva.com/resources/veeva-unveils-powerful-new-digital-tools-to-enable-the-future-of-on-demand-physician-engagement/>), indicating strong uptake.

- **Commercial Operations and IT Administrators:** While not the ones engaging in chats or meetings, the “back-end” users such as CRM administrators, commercial operations managers, and IT teams play a role in configuring and overseeing Engage. They set up the permissions, templates, and ensure the system aligns with company policies. For example, admins will configure which reps are mapped to which HCPs in the Engage directory, set the approved email invitation templates, and enable or disable features (like whether HCPs can initiate chats or only respond). They also integrate Engage data into dashboards and reports for leadership. Veeva provides admin tools (Engage group settings, content management, etc.) to support these roles ([Engage Connect FAQ: Engage Connect Chat Functionality – Veeva Product Support Portal](#)) ([Engage Connect FAQ: Engage Connect Chat Functionality – Veeva Product Support Portal](#)). From a **regulatory team** perspective (e.g. Compliance or Legal reviewers), Engage offers peace of mind because every interaction is logged and can be audited. Regulatory personnel might not “use” Engage day-to-day, but they often review the standard operating procedures for its use and may periodically audit transcripts or use the monitoring features to ensure reps stay on-label. The platform’s design – with **compliance “baked in” through pre-approved content and automatic tracking** – means that regulatory teams can allow field personnel more freedom to engage digitally, without as much risk of a rogue communication going unnoticed ([Link](#)). In short, Engage’s intended user base spans from the field to HCPs to the supporting HQ staff, all aligned around a compliant information exchange.

Pharma-Specific Use Cases and Workflows

Because Veeva Engage was created specifically for pharma and biotech companies, its use cases map to common industry workflows for HCP engagement. Here are some of the **key scenarios where Engage is utilized in life sciences**:

- **Virtual Detailing and Remote Sales Calls:** One of the foundational use cases of Engage is to conduct **remote detailing sessions**, i.e. the core sales call delivered via video. Rather than (or in addition to) meeting a doctor in person, a sales rep can detail them over an Engage video call, showing the same approved slides and visuals digitally. This became especially critical during COVID-19 restrictions, but it’s now a permanent fixture of hybrid engagement models. Companies like Boehringer Ingelheim rapidly scaled up remote detailing – hosting **over one million virtual meetings in 12 months** via Veeva CRM Engage to maintain physician connections when access was limited ([Boehringer Ingelheim Makes Rapid Shift to Digital Engagement with Veeva CRM Engage Meeting | Veeva](#)). These remote calls often have surprisingly high engagement: Boehringer observed their **average Engage meeting length doubled to ~20 minutes**, indicating that HCPs who join virtually were willing to spend more time in discussion than in a typical in-person hallway chat ([Boehringer Ingelheim Makes Rapid Shift to Digital Engagement with Veeva CRM Engage Meeting | Veeva](#)). Reps use features like screen-sharing of interactive content, video, and live Q&A in these sessions. A notable workflow improvement is that after an Engage meeting, the call report and metrics (duration, content shared) are already in the system, so the rep can focus on follow-up rather than documentation. Virtual detailing through Engage allows pharma companies to **reach more HCPs with fewer field resources**, and to do so in a way that’s still high-quality and personalized. It’s also flexible: an HCP can join from their phone or computer, wherever convenient, and the rep can conduct calls from their home office if needed – all while the compliance and content delivery are handled by the platform.

- **On-Demand “Pull” Engagement by HCPs:** Traditionally, HCP engagement was very “push” oriented (reps pushing out messages on a schedule). Veeva Engage enables a shift towards **HCP-initiated interactions** – an on-demand model sometimes called “pharma on-demand.” Through Engage Connect, an HCP who has a question doesn’t have to wait for the next rep visit; they can open the app and send a message or request a call. For example, a physician might finish reading a journal article about a new drug indication and want the drug rep’s insight – they can drop a chat message to the rep immediately. Or a doctor starting a patient on a therapy can quickly request patient support materials via Engage. This inbound engagement channel is highly valuable: Veeva’s data suggests that enabling these pull interactions **significantly increases overall digital engagement without cannibalizing in-person interactions** ([Inbound HCP communication channels double digital engagement ...](#)). In other words, when HCPs reach out more on their own, it complements the reps’ efforts and often deepens the relationship. **Use case example:** A clinic’s office manager might use Engage to contact all their reps (across multiple companies) to notify them that the clinic has new sample guidelines or to schedule lunch-and-learn sessions. With Engage, that manager can do this in one app rather than juggling business cards or emails – saving time and ensuring swift communication. Pharma companies benefit by being more available: one senior director at Veeva noted that *“doctors prefer interacting on their terms”* and Engage was built to allow exactly that, enabling **“simple two-way engagement across multiple companies and brands in a single app”** ([Veeva Unveils Powerful New Digital Tools to Enable the Future of On-demand Physician Engagement | Veeva](https://www.veeva.com/resources/veeva-unveils-powerful-new-digital-tools-to-enable-the-future-of-on-demand-physician-engagement/#:~:text=from%20the%20app)) ([Veeva Unveils Powerful New Digital Tools to Enable the Future of On-demand Physician Engagement | Veeva](https://www.veeva.com/resources/veeva-unveils-powerful-new-digital-tools-to-enable-the-future-of-on-demand-physician-engagement/#:~:text=%E2%80%9CDoctors%20prefer%20interacting%20with%20reps,brands%20in%20a%20single%20app% This use case ultimately improves customer service to HCPs and, by extension, helps them get information that can benefit patient care faster.
- **Hybrid Sales Calls (Combining In-Person with Digital):** Engage also supports **augmented in-person interactions**. Reps in the field can use the Engage app even during face-to-face visits for certain benefits. For example, instead of carrying piles of brochures, a rep visiting a doctor can use Engage to send the doctor a follow-up email with a link to a digital brochure before leaving the office (ensuring the content is tracked and the doctor has it handy). Or, consider compliance during a pandemic: a **“contactless” in-person interaction** can be done where the rep and HCP are in the same location but maintain distance – the rep might display content on their own screen and simultaneously use Engage to stream it to the HCP’s device, minimizing close contact but still allowing a shared discussion. Additionally, if during an in-person meeting the doctor says, “Please also send this information to my colleague,” the rep can instantly use Engage’s chat to share the content link or schedule a separate meeting, all on the spot. This blending of physical and digital workflows ensures that **each in-person call is supplemented by digital touchpoints** that reinforce the message. It also means if a rep cannot complete a discussion due to time, they can easily follow up via Engage chat or set a quick remote meeting next day to finish, rather than waiting weeks. The result is a more continuous engagement cycle rather than discrete, infrequent visits.
- **Virtual Events, Roundtables, and Webinars:** Beyond one-on-one calls, Veeva Engage supports larger-scale virtual events in a compliant fashion. This is often used by pharma for regional educational meetings, speaker programs, advisory boards, or broadcasted lunch-and-learns. Engage can facilitate a **“virtual rep-driven event”** with multiple HCP attendees: using the same Zoom-embedded approach, a rep or MSL can host a group meeting or even a webinar where a key opinion leader presents to a set of invitees. Boehringer Ingelheim, for instance, used the platform to host **virtual roundtables and advisory boards**, allowing physicians to “exchange useful information on medical cases and diagnoses” via the online meeting ([Boehringer Ingelheim Makes Rapid Shift to Digital Engagement with Veeva CRM Engage Meeting | Veeva](#)). What Engage brings to these events is the integration to CRM and content: invitations are sent via Approved Email (tracked, with proper opt-outs), attendance is recorded automatically, and

any materials shared (slides, polls, etc.) are approved content. Even **post-event surveys or follow-ups** can be delivered through Engage. This creates an end-to-end solution for digital events that complies with pharma regs (e.g. ensuring only approved slide decks are shown, capturing who attended for transparency reporting, etc.). It also simplifies life for the field team: an event in Engage is managed similarly to an Engage meeting, just with more attendees. In fact, Veeva had a specific product called Engage Webinar for large events ([Veeva Brings Together Real-time Collaboration](#)), but now much of that capability is unified under Engage. Use case example: A pharma company can run a virtual speaker program where an MSL moderates and a physician speaker presents remotely; all invitees join via the Engage link or through Zoom, and the entire event's interactions are logged (including questions asked via chat). **Having this on the same platform as other rep interactions means the insights (like which HCPs asked questions or showed interest) are immediately visible to the relevant reps** for follow-up.

- **Sample Management and Follow-up Workflows:** Engage streamlines the historically paper-heavy process of drug sample distribution. In a typical use case, a sales rep might discuss a medication with a physician, and the physician might want to try it with a couple of patients (sample packs). With Engage, if in-person, the rep could drop off samples and then use the app to **capture the physician's signature electronically on the spot** rather than dealing with a paper form. If remote, the rep can arrange shipment of samples and send a link for the HCP to **acknowledge receipt via e-signature** ([Link](#)). The workflow ensures compliance with FDA sample tracking (per Prescription Drug Marketing Act requirements) because every sample request and fulfillment is documented under that HCP's record. Additionally, by making sample requests easier (one-click for an HCP to request in the app), it encourages appropriate use of sampling. For instance, "*field HCP requests for samples*" can come in digitally ([Link](#)) and reps can fulfill them more rapidly than waiting for the next visit. Some companies have integrated Engage with their sample inventory systems so that once a digital request is approved, it triggers the shipment from a central pharmacy. This use case is particularly useful in remote areas – a doctor can get samples without a rep physically traveling there, all with proper governance. **Engage essentially brings sampling into the digital age**, making it more efficient while meeting all the audit requirements.
- **Regulatory-Compliant Communication and Audit Trail:** Engage is often used to handle scenarios that require strict compliance documentation. For example, consider a case where an HCP asks a question during a chat that might indicate an adverse event (AE) or off-label use. Engage provides a transcript of that chat, which the rep can flag to the pharmacovigilance department as needed, fulfilling the duty to report AEs. The fact that **all text is logged and cannot be modified or deleted by the rep** is crucial here – it ensures transparency and accountability. Another scenario is providing **regulated medical information**: if an HCP asks an MSL a question that requires a custom medical letter or a detailed response, the MSL can use Engage to deliver that response document (which is usually a controlled document from MedComms). The delivery via Engage ensures the response is tracked (when the doctor opens it, etc.) and that it's the approved statement. Should any compliance audit or legal inquiry occur, the company can produce complete records from Engage to show exactly what was communicated to an HCP and when. This is a strong use case in industries like pharma where there have been historical legal settlements around reps allegedly going off-script – Engage essentially **provides a safety net of record-keeping for all digital communications**. Companies can even use the data to proactively monitor for compliance: for instance, running reports on chat transcripts for certain keywords as part of QA. Thus, one of Engage's use cases is simply **maintaining a continuous, FDA-compliant record of HCP interactions across channels**, reducing the reliance on reps' memory or handwritten call notes. It makes audits and inspections (for promotional activities) far less painful since everything is centrally archived and time-stamped ([Veeva Vault CRM Engage | The Digital HCP Engagement Solution | Veeva](#)).

Overall, these use cases show that Veeva Engage is not just a video call tool or a chat app – it's a **comprehensive engagement workflow system** for life sciences. Whether it's a sales call, a medical inquiry, a training webinar, or a sample drop, Engage provides a pathway to do it digitally and compliantly. Importantly, it

is **channel-agnostic but context-specific**: reps and HCPs can move fluidly from an email to a chat to a meeting, all within one ecosystem, which mirrors the natural flow of how conversations evolve.

Real-World Adoption and Case Studies

Since its introduction (initially announced in 2018 ([Veeva Vault CRM Engage | The Digital HCP Engagement Solution | Veeva](#)) with precursor components even earlier), Veeva Engage has seen rapid adoption across the pharmaceutical and biotech industry. It has become a standard component of the commercial tech stack for many companies, large and small. Below are a few highlights and case examples demonstrating how organizations are using Engage and the impact it's had:

- **Broad Industry Uptake:** As of mid-2020s, **over 100 life sciences companies worldwide are using Veeva Engage** as part of their HCP engagement strategy ([Veeva Vault CRM Engage | The Digital HCP Engagement Solution | Veeva](#)). This includes a majority of the top 20 pharma firms and numerous biotechs and medical device companies. In fact, *9 out of the top 10 pharmaceutical companies use Veeva CRM Engage Meeting for remote HCP interactions (Things to consider when creating content for Veeva Engage (and other virtual meeting platforms) - Alpharmaxim)*, underlining its position as a leading solution in the market. The platform is global – it's been deployed in North America, Europe, and Asia-Pacific, with support for local compliance rules and multiple languages. According to Veeva, the **HCP user base has grown to over one million** doctors and clinicians who have used the Engage app or meetings in their dealings with industry ([\[Veeva Unveils Powerful New Digital Tools to Enable the Future of On-demand Physician Engagement | Veeva\]\(https://www.veeva.com/resources/veeva-unveils-powerful-new-digital-tools-to-enable-the-future-of-on-demand-physician-engagement/#:~:text=capabilities%20at%20its%20European%20Veeva,million%20HCPs%20for%20digital%20meetings\)](#)). This network effect is significant: the more HCPs are familiar with Engage, the more likely they are to prefer companies that offer that channel. It also means companies are not dragging HCPs onto an unfamiliar tool – many HCPs might already use Engage for other companies, making them receptive to connecting via the platform.
- **Boehringer Ingelheim's Digital Engagement Success:** *Boehringer Ingelheim (BI), a top-20 pharma company, provides a compelling case study. Even before the COVID-19 pandemic, BI started piloting Veeva Engage in select markets to enable virtual engagements (Boehringer Ingelheim Makes Rapid Shift to Digital Engagement with Veeva CRM Engage Meeting | Veeva)*. This foresight paid off when in 2020 they had to rapidly shift to digital: BI's global field teams hosted *more than one million remote meetings in 12 months* through Engage to stay connected with HCPs ([Boehringer Ingelheim Makes Rapid Shift to Digital Engagement with Veeva CRM Engage Meeting | Veeva](#)). The result was a more flexible, high-touch interaction model. According to Alex Renner, BI's global head of IT for marketing and sales, *"Veeva CRM Engage Meeting gives our medical sales reps and MSLS a better way to connect with doctors and provide them with the information they need on new therapeutic options."* ([Boehringer Ingelheim Makes Rapid Shift to Digital Engagement with Veeva CRM Engage Meeting | Veeva](#)) It not only improved field force productivity but also became **one of the preferred ways for many doctors to interact** with BI ([Boehringer Ingelheim Makes Rapid Shift to Digital Engagement with Veeva CRM Engage Meeting | Veeva](#)). BI used Engage not just for detail visits, but also for hosting virtual roundtables and advisory boards, as mentioned earlier, effectively creating a digital community of HCPs. Another metric BI observed was that the **average remote meeting length reached 20 minutes** (double the previous average), indicating deeper engagement during calls ([Boehringer Ingelheim Makes Rapid Shift to Digital Engagement with Veeva CRM Engage Meeting | Veeva](#)). Engage also integrated with BI's content systems (Vault PromoMats), so that their reps could rapidly deploy new digital content – critical during COVID when information was changing quickly. Andy Fuchs, a Veeva VP, noted that BI's experience showed how digital engagement can **"connect with the right HCPs at the right time through the right channels"**, increasing the flexibility and reach of their teams ([Boehringer Ingelheim Makes Rapid Shift to Digital](#)

[Engagement with Veeva CRM Engage Meeting | Veeva](#)). In summary, Boehringer Ingelheim's case demonstrates that a large organization can standardize on Engage across the globe to maintain and even enhance HCP relationships, driving a successful hybrid engagement strategy.

- **Sanofi's One-Stop HCP Engagement (Engage Connect):** Sanofi, another global pharma leader, was an early adopter of the **Engage Connect** capabilities (the two-way HCP networking features in Engage). Deborah Sullivan, Director of Field Force Automation at Sanofi, described the benefit: *"With Veeva Engage Connect, our field teams can quickly connect with HCPs in a more personal, convenient way through compliant texts, scheduling meetings, and most importantly, sharing patient resources. The app allows us to personalize customer interactions while giving HCPs a one-stop-shop where they can proactively connect with reps from across the industry for support that ultimately helps improve patients' lives."* ([Veeva Unveils Powerful New Digital Tools to Enable the Future of On-demand Physician Engagement | Veeva](<https://www.veeva.com/resources/veeva-unveils-powerful-new-digital-tools-to-enable-the-future-of-on-demand-physician-engagement/>#:~:text=%E2%80%9CWith%20Veeva%20Engage%20Connect%2C%20our,%E2%80%9D)) ([Veeva Unveils Powerful New Digital Tools to Enable the Future of On-demand Physician Engagement | Veeva](<https://www.veeva.com/resources/veeva-unveils-powerful-new-digital-tools-to-enable-the-future-of-on-demand-physician-engagement/>#:~:text=most%20importantly%2C%20sharing%20patient%20resources%2C%E2%80%9D,%E2%80%9D)). This quote highlights several real-world outcomes: more personal connections via chat, the ability for HCPs to self-serve (find the right rep or resource on their own), and an emphasis on **patient-centric support** (e.g. quickly getting patient education materials to a doctor). Sanofi's use of Engage Connect suggests that big pharma sees value in not just scheduled remote calls, but also in facilitating ad-hoc, HCP-initiated interactions across company lines. It effectively turns the old rep-HCP relationship model into a more collaborative, on-demand partnership. Sanofi participated in the launch of these new features around 2021, and by making the Engage app a central point of contact, they aimed to improve the HCP experience dramatically. The success is measured by adoption: as more HCPs installed the app to reach Sanofi, it also opened the door for them to use it with other companies, creating a network effect that benefits the industry at large.
- **Improved Responsiveness and HCP Satisfaction:** Several companies have reported **faster response times and higher customer satisfaction** after implementing Engage. For example, at Boehringer Ingelheim, a commercial director noted that with Engage, reps could answer HCP needs more promptly than before: *"Engage allowed reps to respond more quickly to HCP requests for patient resources, content, or samples."* ([Boehringer Ingelheim: Field HCP-Centric Engagement | Veeva](#)). Speed matters – in an era where HCPs expect consumer-grade immediacy, being able to get an answer or material in minutes can set one company apart from another. Veeva's own usage metrics showed that **over 90% of rep chat responses occur within 5 minutes** on Engage, demonstrating the field's attentiveness via this channel ([Link](#)). This in turn leads to HCPs trusting and using the channel more. Many HCPs have rated the Engage app highly – Veeva cites an HCP user experience rating of **4.75 out of 5** on average ([Link](#)). Such satisfaction likely comes from the convenience and control they experience. Also, by centralizing interactions, Engage reduces the noise for HCPs (fewer disparate emails, texts, and calls) which can improve their overall perception of a company's service. Some firms have also linked Engage to better field performance: reps who actively use Engage often reach more HCPs and achieve higher engagement metrics (like content views or follow-up meetings) than those who rely solely on traditional methods. While quantitative ROI figures are company-specific and not always public, the widespread adoption by top companies suggests they are seeing positive results in areas like **increased HCP reach, more frequent touchpoints, and even potential increases in sales outcomes** (due to staying top-of-mind and providing timely info, which can influence prescribing habits).
- **Adaptation and Change Management:** Internally, companies have treated the rollout of Engage as a change management exercise. A large biopharma (as described in a Veeva case example) found that

training and empowering reps was key to success ([Driving HCP-Preferred Engagement | Veeva](#)) ([Driving HCP-Preferred Engagement | Veeva](#)). They convened cross-functional teams – involving **marketing, sales leadership, compliance, legal, and training** – to govern the pilot and scaling of Engage features ([Driving HCP-Preferred Engagement | Veeva](#)). By doing so, they ensured that all stakeholders were comfortable (e.g. compliance knew the monitoring was in place, legal approved the chat disclaimers, etc.) and that reps were coached not just on *how* to use Engage, but *when* and *why* to use it ([Driving HCP-Preferred Engagement | Veeva](#)) ([Driving HCP-Preferred Engagement | Veeva](#)). This particular company emphasized to reps that Engage chat isn't just a new widget – it's a tool to deliver better service (like quick answers and resources) and to complement face-to-face skills ([Driving HCP-Preferred Engagement | Veeva](#)). As a result, uptake improved as reps saw it as an aid, not a threat. Many organizations have followed similar steps: starting with Engage Meeting (video calls) during the pandemic out of necessity, then gradually adding the chat and content-sharing functionalities as a natural extension. Now, post-pandemic, the consensus in the industry is that a **hybrid model** is here to stay – reps will do both in-person and Engage-based interactions depending on HCP preference, and having the **right digital platform like Engage is critical for enabling that hybrid approach** ([Driving HCP-Preferred Engagement | Veeva](#)) ([Driving HCP-Preferred Engagement | Veeva](#)).

In conclusion, Veeva Engage has become a cornerstone for digital HCP engagement in the pharma and biotech sector. Its features closely mirror the workflows sales and medical teams need, but in a modern, cloud-based manner that meets strict regulatory standards. By focusing exclusively on life sciences requirements – such as content compliance, sample tracking, and integrated CRM data – Veeva Engage differentiates itself from generic communication tools, and this specialization is clearly resonating with both companies and HCPs. The platform's real-world use shows improved efficiency and connectivity: **field teams are more agile and responsive, and HCPs have greater access to the information they want, when they want it**. As the industry continues to evolve toward more on-demand and omnichannel engagement, Veeva Engage's role is likely to grow, enabling pharma companies to support healthcare professionals in better ways and ultimately contributing to improved patient care through timely information exchange.

Sources: Veeva Systems – *Product Briefs & Official Announcements* ([Link](#)) ([Veeva Vault CRM Engage | The Digital HCP Engagement Solution | Veeva](#)) ([Veeva Brings Together Real-time Collaboration](#)); Veeva Customer Success Stories and Blog ([Boehringer Ingelheim Makes Rapid Shift to Digital Engagement with Veeva CRM Engage Meeting | Veeva](#)) ([[Veeva Unveils Powerful New Digital Tools to Enable the Future of On-demand Physician Engagement | Veeva](#)](<https://www.veeva.com/resources/veeva-unveils-powerful-new-digital-tools-to-enable-the-future-of-on-demand-physician-engagement/#:~:text=%2A%20Compliant%2C%20two,calls%20directly%20from%20the%20app>)) ([Driving HCP-Preferred Engagement | Veeva](#)); Industry Communications ([Things to consider when creating content for Veeva Engage \(and other virtual meeting platforms\) - Alpharmaxim](#)).