

Veeva FormTrak: Integrated Market Access Messaging for Life Sciences Field Teams

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Veeva CRM

**Deliver timely and relevant
access messaging to HCPs**



Veeva FormTrak: Empowering Pharma Market Access and Field Teams

Introduction

Modern pharmaceutical and biotech companies face a critical challenge in market access: ensuring that healthcare providers (HCPs) stay informed about up-to-date formulary coverage and policy changes for their therapies. Even after a drug secures favorable coverage from payers, the **"pull-through"** – driving utilization of that coverage by prescribers – is not guaranteed. Provider offices are inundated with pharma messaging, so field teams must deliver concise, relevant, and approved information that stands out and aids prescribing decisions ([Link](#)). Keeping providers updated with real-time, accurate coverage data is a **critical step to ensure therapies reach the patients who need them** ([MMIT Integrates FormTrak Market Access Tool with Veeva CRM – AIS Health - MMIT](#)). Veeva FormTrak, an integrated solution from MMIT (Managed Markets Insight & Technology), is designed to meet this need. It is a dynamic platform that pairs MMIT's industry-leading patient access data with Veeva CRM (Customer Relationship Management), the dominant field CRM in pharma, to create **an unprecedented solution for prescriber engagement** ([Link](#)). This white paper provides a technical and strategic overview of Veeva FormTrak and its value for market access professionals and sales representatives, highlighting how it enables better payer engagement, pull-through, and targeted HCP outreach in a compliant, data-driven manner.

Technical Overview: Integration with Veeva and MMIT Data Services

What is Veeva FormTrak? At its core, FormTrak is a **promotional platform natively integrated into Veeva CRM** ([FormTrak | Promotional | MMIT](#)). It connects comprehensive formulary and medical policy information from MMIT's data services directly to promotional content templates inside Veeva ([MMIT Integrates FormTrak Market Access Tool with Veeva CRM – AIS Health - MMIT](#)). In practical terms, this means pharma field representatives using Veeva CRM can seamlessly access up-to-date coverage data and create tailored "formulary pull-through" materials without leaving their CRM interface ([MMIT Integrates FormTrak Market Access Tool with Veeva CRM – AIS Health - MMIT](#)) ([MMIT Integrates FormTrak Market Access Tool with Veeva CRM – AIS Health - MMIT](#)). MMIT's data – including formulary status (e.g. tier placements, restrictions like prior authorization or step therapy) and payer policy details – is combined through Norstella's LinQ data integration to serve as a **single source of truth** for coverage information ([FormTrak | Promotional | MMIT](#)). Because MMIT is the direct owner of these data assets, companies benefit from near real-time updates and accuracy, without reliance on third-party data brokers ([Link](#)).

Native Veeva CRM Integration: FormTrak is the first (and currently only) **native integration of a market access tool within Veeva CRM** ([FormTrak | Promotional | MMIT](#)). Being "native" implies that FormTrak is embedded in the Veeva environment as if it were a built-in module, rather than an external app or plugin. This tight integration brings several technical advantages:

- *Seamless User Experience:* Field reps leverage their existing Veeva CRM workflows and configurations to use FormTrak ([MMIT Integrates FormTrak Market Access Tool with Veeva CRM – AIS Health - MMIT](#)). For example, a rep can pull up an HCP's profile in Veeva and with a few taps generate a coverage summary

card for that physician, all within the same application. There is no need to switch to a separate tool or re-enter customer data – improving efficiency and reducing friction in the field.

- **Offline Access:** Veeva CRM's mobile app (often used on iPads by reps) supports offline content, and FormTrak fully utilizes this capability. Reps can access formulary data and FormTrak materials even in clinics with poor internet connectivity ([MMIT Integrates FormTrak Market Access Tool with Veeva CRM – AIS Health - MMIT](#)). The data and templates sync when connectivity is available, ensuring up-to-date information while offline mode provides reliability during sales calls.
- **Multichannel Support:** Because it lives inside Veeva, FormTrak content can be deployed across multiple engagement channels. Reps can use it during in-person details, **in email or remote detailing sessions**, and even within Veeva Engage meetings (virtual meetings with HCPs) ([MMIT Integrates FormTrak Market Access Tool with Veeva CRM – AIS Health - MMIT](#)). The integration with Veeva Approved Email means reps can email a formulary update or policy card to an HCP through the approved system, and the interaction is logged. Similarly, content can be presented via Veeva CLM (Closed-Loop Marketing) on-screen or shared in a video call – all while maintaining compliance and tracking.
- **Data Synchronization:** FormTrak continuously receives data updates from MMIT's services (formulary updates, policy changes, etc.) which are then available to field users in real-time or near real-time. This ensures that whenever a rep generates a coverage view or sends an update, the information reflects the latest payer environment ([Link](#)). If a health plan changes a therapy's status (for example, moving it to a more preferred tier or adding a new restriction), that change propagates into FormTrak promptly. Additionally, **alerting mechanisms** are built in: suggestions can notify reps when a relevant coverage change occurs in their territory so they know to re-engage those providers with new information ([FormTrak | Promotional | MMIT](#)).

From a technical standpoint, the architecture relies on Veeva's open API and CRM extensibility, combined with MMIT's data feeds. The result is an integrated tool that uses **Veeva as the delivery platform** and **MMIT as the content engine**, eliminating manual data pulls or separate databases that reps used to consult.

FormTrak's Veeva integration has earned it a "Veeva Gold Product Partner" certification ([Link](#)), indicating it has met Veeva's high standards for security, performance, and compatibility within the CRM ecosystem. For IT and commercial operations teams, deployment of FormTrak is simplified by its native nature – it can be enabled within Veeva with minimal custom development, and it works with standard Veeva CRM configuration elements (accounts, territory alignments, call logging, etc.) ([MMIT Integrates FormTrak Market Access Tool with Veeva CRM – AIS Health - MMIT](#)).

Key Features and Capabilities of FormTrak

FormTrak brings together a robust set of features tailored to both field sales needs and home-office analytics needs. Below we outline its primary capabilities:

- **Dynamic Coverage Cards and Templates:** Field teams can create **promotional "cards"** that present coverage information in a clear, HCP-friendly format ([FormTrak | Promotional | MMIT](#)). Several template types are available, including:
 - **Formulary Grid:** A table showing the drug's formulary status across top plans in the HCP's region or patient mix. For example, a grid might list the major insurance plans or pharmacy benefit managers and indicate the product's tier, any restrictions, and perhaps competitor statuses for context. This gives HCPs a quick view of how easy or hard it is for patients to access the therapy across insurers.
 - **Coverage Announcement Card:** A one-page summary highlighting a recent **coverage win or change** – e.g., "Drug X is now covered on Payer Y with \$X copay" – which reps can use as a leave-behind or email content to notify clinics of new favorable coverage. This is crucial right after a formulary

addition, so that physicians are aware of expanded access ([[MMIT Integrates FormTrak Market Access Tool with Veeva CRM – AIS Health](#)

- [MMIT \]\(https://aishealth.mmitnetwork.com/blogs/spotlight-on-market-access/mmit-integrates-formtrak-market-access-tool-with-veeva-crm#:~:text=MMIT%E2%80%99s%20FormTrak%20solution%20allows%20pharma,native%20integration%](https://aishealth.mmitnetwork.com/blogs/spotlight-on-market-access/mmit-integrates-formtrak-market-access-tool-with-veeva-crm#:~:text=MMIT%E2%80%99s%20FormTrak%20solution%20allows%20pharma,native%20integration%20)
- **Competitor Comparison:** A template that compares the coverage of the company's product to key competitor products on various payer formularies. This helps reps position their therapy when an HCP might say "I usually prescribe CompetitorDrug – is yours covered as well as theirs?" The rep can visually show if their product has broader or comparable coverage, or discuss differences in restrictions.
- All templates are **pre-loaded with data** specific to the rep's territory or the HCP's patient insurance mix. FormTrak leverages actual prescription and claims data (either the company's own or MMIT's datasets) to decide which plans and data points are most relevant for that specific HCP ([Link](#)). This targeting ensures the content is not a generic national snapshot, but truly reflective of the provider's world – making it immediately actionable for the HCP.
- **Real-Time Data Updates and Alerts:** FormTrak continuously updates its formulary and policy content from MMIT's feeds. It will **alert field reps when a market access milestone occurs**, such as a new formulary approval, a change in step therapy requirements, or a competitor's coverage status change ([Link](#)). These proactive alerts allow reps to engage HCPs *before* or as soon as a change impacts prescribing, rather than finding out weeks later. For instance, if a major insurer removes a requirement for prior authorization on the medication, the rep can quickly inform the affected physicians, potentially before they encounter the next patient. This responsiveness helps HCPs stay ahead of administrative hurdles and positions the rep as a valuable partner with timely information.
- **Integrated HCP and Account Insights:** Aside from coverage data, FormTrak provides an **"Access Overview" dashboard for brand teams** that aggregates key metrics about each account or territory ([FormTrak | Promotional | MMIT](#)). It can ingest prescription data (e.g., volume of prescriptions by physician or region) and "lives" data (the number of insured lives covered under each plan) to highlight where potential patients are and how prescribing behavior intersects with access barriers ([FormTrak | Promotional | MMIT](#)) ([Link](#)). Field reps using FormTrak thus have access to **account intelligence** previously siloed in spreadsheets or separate tools: they can identify each provider's current prescribing habits and see the estimated patient opportunity in that region ([Link](#)). A rep might note, for example, that Dr. A writes 60% of prescriptions in this drug class for a competitor drug, but that many of Dr. A's patients have insurance that now prefers our drug – a key insight to drive a conversation. Brand managers can toggle between **views based on lives coverage vs. actual physician prescribing behavior** to prioritize where field efforts should focus ([Link](#)) ([Link](#)).
- **Multi-Channel Delivery and Tracking:** Every time a rep uses FormTrak content – whether presenting a coverage card on a tablet, sending an email, or leaving behind a printout – those activities can be captured and analyzed through Veeva CRM's tracking capabilities. FormTrak is fully compatible with Veeva's call reporting and digital engagement metrics. **Performance can be tracked across templates to see what resonates with HCPs** ([Link](#)). For example, a marketing team could learn that the formulary grid is opened and discussed in 80% of calls but an announcement card is only used 20% of the time, suggesting the grid is more valuable or perhaps that announcement cards are underutilized. One early adopter noted that having access to Veeva's built-in metrics and dashboards for FormTrak content allowed leadership to **see how often reps use each piece of content in channels like Veeva Engage and Approved Email** ([MMIT Integrates FormTrak Market Access Tool with Veeva CRM – AIS Health - MMIT](#)). This closed-loop feedback is invaluable for refining messaging strategy and training: if certain content isn't being used or an HCP never opens the email, adjustments can be made quickly.

- **Ease of Use and Deployment:** From an end-user perspective, FormTrak was built to be intuitive inside the familiar Veeva interface. Early user feedback called it a **“one-stop shop for our field team”** inside Veeva ([MMIT Integrates FormTrak Market Access Tool with Veeva CRM – AIS Health - MMIT](#)) – reps no longer need multiple tools for formulary lookups, presentation, and email follow-up; FormTrak consolidates those tasks. Implementation-wise, since it’s a native Veeva component, it leverages standard Veeva CRM objects (accounts, territories, call records) and can often be rolled out without heavy IT development. This simplicity means pharma companies can deploy it relatively quickly across their field force. In fact, one pharma executive remarked that it was their “smoothest go-live ever with a Veeva CRM vendor” and that the tool *“works without issues”* in the live environment ([FormTrak | Promotional | MMIT](#)) – a testament to the robust integration and support model.

With these features, FormTrak serves as a comprehensive solution that bridges data and execution: **field reps get actionable insights and content for HCP engagements, while home-office teams get visibility and strategic control over the messaging and its impact.**

Benefits for Field Sales Teams (Reps)

For pharmaceutical sales representatives, especially those focusing on promoting access (sometimes called **“market access reps”** or account managers), Veeva FormTrak delivers several strategic benefits:

- **Enhanced Payer Engagement & Pull-Through:** Field reps are the bridge between payers’ formulary decisions and the prescribers who need to act on that information. FormTrak strengthens this bridge by making it *easier to communicate new coverage wins* directly to HCPs ([MMIT Integrates FormTrak Market Access Tool with Veeva CRM – AIS Health - MMIT](#)). The moment a drug gains a better formulary position or a utilization barrier is removed, reps can rapidly deploy approved messages to their physicians highlighting the improved access. This timely communication is the essence of effective **pull-through** – ensuring that favorable coverage translates into prescriptions written. By keeping providers aware of coverage changes **in real time**, reps help maximize the ROI of market access efforts and also demonstrate to payers that the pharma company is actively driving utilization under the payer’s plan. In other words, **FormTrak enables coordinated payer engagement via the field force**, as reps deliver payer-specific messages (e.g., “Now covered on Plan X with no prior auth”) that reinforce the value of the payer’s decision and encourage appropriate use by prescribers.
- **Tailored, Data-Driven HCP Conversations:** One-size-fits-all sales messages are ineffective in today’s data-rich environment. FormTrak allows reps to **tailor conversations to each provider** using actual local data. Because it can show, for instance, the top 5 insurance plans for Dr. Smith’s patient population and exactly how *our* drug is covered on each, the rep can focus the discussion on the plans that matter most to that physician ([Link](#)). This level of personalization (sometimes called **account-based selling**) means the HCP isn’t bored with irrelevant info about plans they rarely see; instead the rep might say, “Doctor, I know a lot of your patients have Acme Health Plan – as of this month, Acme moved our therapy to Tier 2, making it more affordable. Let’s discuss what that means for your practice.” Such targeted messaging resonates strongly with providers because it directly impacts their day-to-day prescribing hurdles. Moreover, by incorporating the HCP’s **prescribing behavior data**, reps can identify opportunities or gaps. If the data shows the provider isn’t prescribing the drug due to past coverage issues, the rep now has a chance to address that with evidence that those barriers have changed. This kind of informed discussion was highlighted by a market access lead who praised FormTrak for *“getting reps focused on where the opportunity is, especially at the doctor level”* ([FormTrak | Promotional | MMIT](#)). In short, FormTrak helps field teams **speak the HCP’s language** – framing the product’s value in terms of the HCP’s own patient access situation.

- **Navigating and Overcoming Formulary Barriers:** Even with good coverage, there are often nuances like prior authorizations, step therapies, quantity limits, or differences between pharmacy vs. medical benefit coverage. FormTrak equips reps with the specifics of these policies (since it includes medical policy detail from MMIT's database ([MMIT Integrates FormTrak Market Access Tool with Veeva CRM – AIS Health - MMIT](#))), so reps can proactively discuss how to navigate them. For example, if a drug requires prior authorization on a certain plan, the rep can provide the clinic with the necessary forms or tips, or highlight any support program the company offers for that situation. If an HCP is concerned about a high copay, the rep, having the formulary tier info, can point out patient assistance options or alternate covered strengths. By having all this **access and policy information at their fingertips**, reps become problem-solvers for the practice rather than just product promoters. This builds trust and can differentiate their engagement. It also shortens the time an HCP's office might spend figuring out coverage on their own, which is a welcome relief to busy staff. Ultimately, reps using FormTrak can help **improve access outcomes** by guiding HCPs through insurance hurdles, ensuring more prescriptions get to fill without surprises at the pharmacy.
- **Consistency and Confidence in Messaging:** Because FormTrak uses company-approved templates and up-to-date data, reps can be confident that whatever they share is accurate and compliant. This is a significant benefit in an industry where the rules on promotional material are strict. Reps no longer risk showing an outdated formulary PDF or quoting a months-old coverage status. Everything they present – a formulary grid, a coverage update – is pulled from a **validated, current database**. Consistency of message is also ensured across the team; for example, every rep in the country will relay the same coverage win information in the same format, rather than each creating their own version. One early adopter noted that **FormTrak in Veeva allows the field team to deliver the same message and real-time information** to practice managers, with customization only by territory as needed ([MMIT Integrates FormTrak Market Access Tool with Veeva CRM – AIS Health - MMIT](#)). This means HCPs in different regions hear a aligned story, and any tweaks are based on data differences, not on reps diverging in how they describe coverage. For the field, this consistency removes the guesswork – they don't have to memorize each payer's details (the tool provides them) and they know the materials are already approved for use.
- **Efficiency and Productivity Gains:** By streamlining pre-call planning and the call itself, FormTrak saves reps time. Instead of manually researching the latest formulary status for each plan before a call, the rep can rely on FormTrak's insights and even do on-the-spot lookups if needed. The integration with Veeva also means any action is automatically logged; if a rep sends an Approved Email with a FormTrak card, Veeva captures that activity without the rep needing to double-document it. This efficiency lets reps focus more on engaging customers and less on administrative updates. Additionally, having an offline-capable tool means fewer missed opportunities – a rep can confidently walk into any office and not worry about whether they have the latest spreadsheet or an internet connection; they always have the info ready. Over time, such productivity enhancements can translate to more HCP interactions per week and better coverage of target accounts.

In summary, for sales representatives, FormTrak acts like a smart assistant that provides *the right data at the right time* to support their conversations. It enhances their credibility with HCPs (as a knowledgeable partner on access matters) and empowers them to capitalize on formulary wins quickly, driving prescription uptake in alignment with payer coverage.

Benefits for Market Access and Brand Teams

Market access professionals and brand managers (the home office teams) also derive significant value from FormTrak. While reps are executing in the field, **market access teams and brand leads need visibility and**

tools to monitor and guide access strategy – which FormTrak provides through its data integration and analytics components:

- **Monitoring Formulary Coverage Performance:** One of the core needs for market access teams is to continuously track how a drug is performing across different payers' formularies and to measure the impact of those formulary positions on usage. FormTrak contributes to this by aggregating coverage data and making it available in a **dashboard format for home office**. For example, a market access lead can view the overall landscape: how many lives have preferred access vs restricted access, which major payers are still not covering the product, and how these figures trend over time. Although MMIT offers standalone analytics tools as well, FormTrak's **Access Overview** brings key data into one place tied to field activity ([FormTrak | Promotional | MMIT](#)). Armed with this, market access teams can identify where there are gaps in coverage (which might inform contracting or payer outreach priorities) and where coverage is strong but prescriptions are lagging (indicating a need for more pull-through efforts or physician education in those areas). Essentially, it helps answer: *Are we fully capitalizing on our formulary wins?* and *Where should we focus next to improve access?* By having real-world prescribing data alongside coverage status, teams can correlate coverage changes with prescription uptakes or declines, thus **gauging the success of market access initiatives** in near real time.
- **Strategic Targeting and Resource Allocation:** FormTrak's insights into physician prescribing behavior and patient distribution enable more strategic deployment of field resources. **Brand leads can use real-world data to guide field rep deployment** ([Link](#)). If the data shows that a particular region has a high density of target patients with relatively poor coverage, the market access team might decide to add an overlay rep or increase educational efforts there. Conversely, if a region has excellent coverage and high adoption already, resources might be reallocated where the need is greater. FormTrak allows brand and access leads to **drill down by territory, account, and even prescriber (NPI)** to understand specifics like market share vs competitors, potential patient reach, and which HCPs should be high priority ([FormTrak | Promotional | MMIT](#)). This granular insight means **sales and marketing strategy can be fine-tuned at a local level**. For example, a brand manager may discover through FormTrak that in Territory X, a competitor drug has majority market share despite similar coverage — prompting a new campaign or rep training in that territory to recapture share. Without such integrated data, these decisions might rely on quarterly sales data or anecdotal feedback; FormTrak makes them data-driven and timely.
- **Optimizing Messaging and Materials:** Because FormTrak tracks content usage and HCP engagement, marketing teams can optimize their promotional materials and messaging strategy. If the data shows certain template cards are rarely used or HCPs aren't responding to them, the team can investigate why – maybe the content needs refinement or reps need more training on when to use it. On the flip side, highly utilized content indicates what **message is resonating in the field**. Market access marketing teams can then reinforce those messages or create similar materials for other products. This continuous feedback loop allows for an **evidence-based evolution of the market access messaging**. It moves the strategy from a set-and-forget formulary letter to an interactive, responsive approach: knowing which points resonate with physicians and adjusting accordingly. In one example, early adopters of FormTrak appreciated that *leadership could see how often reps were using specific content in Veeva Engage and Approved Email* ([MMIT Integrates FormTrak Market Access Tool with Veeva CRM – AIS Health - MMIT](#)), giving management a clear picture of field activity and HCP interest. This can feed into better coaching for reps (“we noticed you’re not using the competitor grid; let’s discuss how it might help with your hesitant prescribers”) and better content development (“the field finds value in the policy update card – consider developing more pieces around prior authorization support”).
- **Ensuring Consistent Market Access Messaging:** Market access teams are often concerned that the field might not always communicate payer information accurately or consistently, which could lead to misunderstandings or even compliance issues. FormTrak mitigates this by ensuring that what reps share about formulary status is **always accurate and up to date** (since it's coming straight from the curated MMIT data source). This consistency means the **branding and messaging around access are uniform**

nationwide, aligning with what the account directors might be saying to the payers themselves. For example, if the company's value proposition to a payer was "we will help drive utilization if you add us to formulary," FormTrak is the execution arm of that promise – and market access can monitor that it's indeed happening. In effect, FormTrak operationalizes market access strategy on the ground and provides a window back to home office to watch that strategy play out.

- **Measuring Pull-Through Impact:** By combining formulary data, HCP engagement, and (if available) prescription lift data, companies can attempt to measure the impact of their pull-through campaigns. While this often involves several data sources, FormTrak contributes a key piece: it logs the outreach (e.g., which HCPs were informed of what coverage change and when). When subsequent sales figures or patient onboarding numbers are analyzed, market access teams can better attribute successes to those pull-through efforts. For instance, if a new coverage win on Payer Y was communicated via FormTrak to 100 targeted HCPs in Q1, and by Q2 prescriptions from Payer Y's patients increased 30%, that provides evidence of effective pull-through. Such case studies help demonstrate the value of the market access field strategy internally (to leadership) and can even be shared externally. In fact, MMIT has documented cases where use of FormTrak and related tools helped pharma clients "spread the news about [a] product's coverage to healthcare providers" successfully ([Analytics | Payer Data Intelligence - MMIT](#)). By highlighting these outcomes, market access teams can continuously justify and refine their investments in tools like FormTrak.
- **Cross-Functional Alignment:** FormTrak's data and dashboards also encourage collaboration between sales, market access, and even medical teams. Since everyone is looking at the same **source of truth for coverage data**, the conversations between field reps and market access directors become more streamlined. A market access director can log into the dashboard and see the status of field pull-through activities or which plans are generating more questions, and then coordinate with the field accordingly. This transparency can break down silos – sales and access teams can jointly identify where physician perception doesn't match payer reality and work together to correct it. Moreover, because the data is coming from MMIT (which many market access departments already use for payer insights), it aligns the field tactics with the broader market access intelligence the company has.

In essence, FormTrak enables market access and brand teams to **actively manage and support formulary pull-through efforts at scale**. It provides them with both a telescope (big-picture view of coverage status and impact) and a microscope (drill-down into specifics of each territory or account). By linking field execution with home-office strategy, it ensures that the investment in securing payer coverage is fully leveraged through effective communication and tactical follow-up.

Use Cases and Real-World Examples

To illustrate how Veeva FormTrak works in practice, consider a few hypothetical (but grounded) scenarios in pharma and biotech:

- **Case Example 1: New Formulary Win Pull-Through** – A biotech company has a specialty drug that was recently added to a major national PBM's formulary with "Preferred" status. The market access team updates the coverage data in MMIT (or it flows in automatically via MMIT's feeds). FormTrak immediately reflects this update and triggers an **alert to field reps** in relevant territories: "Great news – PayerOne PBM has added MyDrug to their Preferred Tier effective Jan 1." Each rep then uses FormTrak to generate an **announcement card** highlighting this news and either emails it to their top cardiologists and clinics or plans a visit to discuss it. During a call, the rep pulls up a **formulary grid** in the FormTrak app showing that for PayerOne (and other local plans) the drug is now in a favorable position ([MMIT Integrates FormTrak Market Access Tool with Veeva CRM – AIS Health - MMIT](#)). The HCP, who perhaps had been hesitant to prescribe due to cost concerns, sees that many of their insured patients now have easy access

to the therapy. The rep and HCP discuss which patient types to consider for the drug now that access is broadened. Over the next quarter, the company observes a significant uptick in prescriptions from patients under that PBM – a direct result of the orchestrated pull-through. In this scenario, FormTrak served as the **execution tool to swiftly cascade a payer win to the point-of-care**, ensuring no time was lost in capitalizing on the formulary addition.

- **Case Example 2: Targeting High-Opportunity Providers** – A large pharmaceutical company uses FormTrak in conjunction with its claims data to sharpen field targeting. Suppose their analysis shows that in a certain region, there is a **high potential patient population** for their diabetes drug (say 10,000 patients) but the drug's market share is low because one big local health plan had it non-preferred. Recently, that health plan improved the drug's formulary status. The brand lead looks at FormTrak's dashboard and identifies the specific physicians who see many patients from that health plan. They find that Dr. Jones, for example, treats a large number of diabetic patients and most of them have this health plan, but Dr. Jones hasn't been prescribing the company's drug much. Recognizing an opportunity, the brand team works with the sales manager to have a rep prioritize Dr. Jones' practice. When the rep calls on Dr. Jones, they use FormTrak to show a **competitor vs. our drug comparison** on formulary coverage – illustrating that where the competitor was once preferred on that plan, now both drugs have parity or our drug is advantaged. The rep also discusses patient support programs now available. Dr. Jones, seeing that coverage barrier is essentially gone, decides to start more patients on the company's drug. This targeted approach, enabled by FormTrak's insight into both **lives data and physician behavior**, directs efforts to where they can yield the most gain ([Link](#)) ([Link](#)). Over time, the company can track if Dr. Jones' prescribing of their drug increases, validating the approach.
- **Case Example 3: Monitoring and Messaging Adjustments** – A mid-sized pharma in the women's health space uses FormTrak and other MMIT solutions to monitor how payers are treating its new contraceptive. The market access team notices via MMIT data that several regional payers have implemented step therapy requiring patients to try older therapies first. They quickly update the field via FormTrak content that **explains the step edit and how to navigate it**, so reps can educate OB/GYN offices on what paperwork is needed to get the contraceptive approved. Meanwhile, one payer in the Southeast unexpectedly *drops* the contraceptive to a non-preferred tier due to budget reasons. Through an internal alert (possibly via MMIT's Surveillance product feeding into FormTrak), reps in that region are notified. They arrange meetings with top prescribers to manage the concern – for instance, providing information on exception processes or informing them of patient assistance for those affected. Simultaneously, the company's payer account director opens discussions with that payer to advocate for reinstatement. During this turbulent period, the **market access team uses FormTrak's metrics** to see how often reps are discussing these challenges with HCPs and which messages are most frequent. They find that the "step therapy explanation" card was used in 50 calls in a month, indicating that it's a major issue being addressed proactively. By the end of the year, thanks to these coordinated efforts, HCPs remain aware of how to ensure patients still get the contraceptive, and the payer eventually moves it back to a better tier. This example shows how FormTrak helps **monitor ongoing formulary performance** (identifying where coverage is faltering or improving) and enables agile communication to HCPs so that **messaging can be optimized in response to payer policy changes**. In a real-world case, MMIT reported that a small pharma company leveraged such tools to understand payer coverage for their product and successfully **communicate changes to providers** as they happened ([FormTrak](#) | [Promotional](#) | [MMIT](#)).

These scenarios demonstrate the versatility of FormTrak: from new launches to steady-state products facing coverage changes, it supports a range of use cases. Companies like Novo Nordisk have publicly embraced FormTrak to equip their sales reps with **"efficient, accurate and real-time pull-through messaging"** in competitive markets ([Infographic Download: MMIT FormTrak in Veeva](#) | [MMIT \(Managed Markets Insight & Technology\)](#)). In practice, organizations have found that the integration of FormTrak in Veeva CRM drives smoother workflows and more impactful field interactions. A pharma executive described their team's experience as *"the best partnership and application for our team,"* emphasizing how it streamlined processes

that were previously cumbersome ([FormTrak | Promotional | MMIT](#)). Across the industry, adoption has grown – as of early 2025, **at least 25 organizations using FormTrak in Veeva to support 46 brands** ([Link](#)) – suggesting that these benefits are being realized broadly, in a variety of therapeutic areas and company sizes.

Compliance and Data Governance Considerations

Any tool that deals with promotional communication and healthcare data in pharma must be evaluated through the lens of compliance and data governance. Veeva FormTrak was designed with these considerations at the forefront:

- **Promotion Compliance (MLR Approval):** Pharmaceutical promotions must be reviewed and approved by Medical, Legal, and Regulatory (MLR) teams to ensure they are accurate, on-label, and fair-balanced. FormTrak respects this by using **pre-approved templates** for all its materials. The content format (such as the layout of a formulary grid or wording of an announcement) is created in cooperation with the company's MLR team and locked down. Reps using FormTrak can input or select only certain data (like choosing which plans to display), but they cannot alter the approved text or introduce unvetted claims. This ensures that even as data is dynamically inserted, the overall piece remains within **legally approved formats** ([Link](#)). In fact, one driving principle for FormTrak was to give reps simple, **legally compliant leave-behind materials** in an environment where data accuracy and consistency are paramount ([Link](#)). By limiting content customization to just the data fields (which are factual data points from MMIT), FormTrak balances personalization with compliance. It effectively streamlines the creation of personalized materials *without* requiring a fresh MLR review for each use, because the underlying template has been vetted and the data inserted is non-promotional factual information (coverage status, etc.). From a compliance standpoint, this is ideal – reps get flexibility and relevance, but within a controlled, approved boundary.
- **Content Tracking and Audit Trail:** Because FormTrak is integrated in Veeva CRM, every interaction with content can be automatically recorded. Veeva CRM is 21 CFR Part 11 compliant (meeting FDA requirements for electronic records/signatures) and is a system of record for many pharma companies. When a rep uses a FormTrak card in a call or sends it via email, it can be logged as part of the call note or the email archive in Veeva. This provides a robust **audit trail** of what was shared with whom and when. If any compliance audit or inquiry arises (for example, an FDA audit on promotional practices or an internal audit on field activity), the company can retrieve records to show exactly what information was communicated. This is a significant governance advantage over ad-hoc communications; it reduces the risk that untracked or non-approved materials slip through. It also helps ensure **adherence to opt-out rules and channel preferences** (since Veeva will manage if a doctor has opted out of emails, etc., ensuring FormTrak content isn't sent in violation of those preferences).
- **Data Privacy and Security:** FormTrak leverages data about HCPs and patients (in aggregate) which necessitates careful handling. The patient data involved is typically **aggregate "lives" counts or de-identified prescription data**, not any individual patient health information (no PHI). This means FormTrak can be used without implicating HIPAA privacy concerns, as the data is at population level (e.g., % of lives covered, or volume of prescriptions by a doctor, which is statistical). However, companies still treat HCP data as sensitive; the fact that a particular doctor writes X number of scripts of a competitor drug, for example, is proprietary information often purchased under license from data vendors. MMIT's integration ensures that this data usage is governed under the company's existing data agreements, and it is not exposed beyond intended use. All data resides within the secure Veeva CRM cloud and MMIT's systems, both of which are designed with pharmaceutical industry security standards. As a Veeva Gold partner solution, FormTrak would have undergone **rigorous security evaluation**. Veeva itself has certifications

and compliance with regulations like EU GDPR, and platform security measures including user access controls, encryption, and audit logs ([\[PDF\] Technical and Operational Security - Veeva SiteVault](#)) ([\[PDF\] Technical and Operational Security - Veeva SiteVault](#)). On the MMIT side, as the data provider, they ensure data integrity (no tampering) and timely updates, which is a facet of data governance – the data is trustworthy and traceable to its source (e.g., payer published formulary data or purchased claims data).

- **Permission Controls:** Not every user should see all data, and FormTrak respects the **territory alignments and permission sets** configured in Veeva CRM. Reps only access information for HCPs and accounts in their assigned territory (enforced by Veeva's account ownership rules). Similarly, if a company has multiple brands using FormTrak, a rep will typically only see the data relevant to their promoted brands. The integration can ingest custom alignments (such as zip-code to territory mappings or account assignments) to ensure compliance with any **firewall or anti-kickback considerations**. For instance, if certain sensitive accounts must not be detailed with certain info, or if a co-promote agreement limits what one field team can see, those rules can be mirrored in how FormTrak displays data. This granular control is essential for data governance, ensuring no unauthorized access or misuse of the data.
- **No Off-Label Information:** The data provided through FormTrak is strictly related to coverage and access for the approved indications of the product. It does not include or allow input of off-label uses. This is an important compliance safeguard – reps are not using FormTrak to communicate anything beyond the status of the therapy as it is officially covered by payers, which by definition pertains to on-label usage. Additionally, any value statements or comparisons in the templates are factual (e.g., "Preferred on 5 of 5 top plans" or "No step therapy required on Plan X"), avoiding subjective or misleading claims. MLR teams ensure that even competitor references are fair and based on published data. By structuring the content this way, FormTrak helps companies stay within the boundaries of promotional regulations while still delivering competitive insights.
- **Regulatory Updates and Maintenance:** Both Veeva and MMIT regularly update their systems to comply with evolving regulations and guidances. For example, if new industry guidelines emerged on how patient data should be presented or if a new requirement for tracking promotional dissemination came about, the FormTrak platform (with support from MMIT/Norstellia and Veeva) would incorporate those changes. Companies using the tool should still have internal SOPs (standard operating procedures) governing its use – e.g., training reps that FormTrak data is only to be used in approved manners, instructing on what to do if a provider asks for something outside of the content, etc. But overall, by using a well-governed platform, the company reduces the compliance burden on individual reps. In the words of one industry expert, building such a solution on Veeva CRM allows pharma to **"limit the number of distribution mechanisms"** for field info, making it easier to control and standardize the process ([Link](#)). Veeva's platform itself is validated and compliant, so plugging FormTrak into it leverages that infrastructure.

In summary, compliance and data governance are strengths of the FormTrak approach. It marries the need for customized, timely field communication with the rigorous oversight required in pharma promotion. By keeping data accurate and content approved, FormTrak helps **clear up coverage confusion without creating compliance risk**. Each stakeholder – from IT security, to legal, to regulatory – can appreciate that the solution maintains integrity of data and adherence to industry standards. This ultimately safeguards not just the company from risk, but also ensures that HCPs receive trustworthy information they can count on.

Conclusion

Veeva FormTrak represents a convergence of **data, technology, and strategy** in the pharmaceutical market access arena. Technically, it integrates the rich payer data assets of MMIT directly into the daily workflow of field teams through Veeva's ubiquitous CRM platform – providing a real-time, user-friendly window into formulary access at the point of HCP engagement. Strategically, it empowers sales and market access teams

to work in unison, delivering relevant coverage messages to providers and collecting field intelligence on what works. The result is a more informed prescriber base and more efficient pull-through of payer decisions: when a payer gives a green light, FormTrak helps ensure the physician is aware and able to act on it, smoothing and simplifying patient access to therapy.

For field representatives, FormTrak adds value by turning complex market access information into actionable talking points and materials, tailored for each conversation. It elevates the quality of discussions with providers – moving beyond the product's features to address the crucial question, "Will my patient be able to get this medication?" By proactively answering that question with data, reps become facilitators of care rather than just promoters. The tool's ease of use and integration means reps can focus on relationships and strategy, supported by accurate insights at their fingertips.

For market access and brand teams, FormTrak provides the feedback loop that has often been missing in access initiatives. They can now observe and guide how coverage information is disseminated in the field and measure its impact on adoption. This closes the gap between **payer strategy and provider execution**. With better visibility, these teams can refine their approaches to payer contracting, physician education, and resource deployment, creating a virtuous cycle of improved access and outcomes.

Importantly, all these advantages come without sacrificing compliance or data governance. In an era where data-driven marketing is key, FormTrak demonstrates how to do it responsibly – leveraging real-world data within a compliant framework to drive better healthcare decisions. The integration being native to a trusted platform like Veeva CRM gives stakeholders confidence that the tool meets enterprise-level standards for quality and security.

In an informative, educational sense, FormTrak's story is one of addressing a clear industry need with innovation. As payers continue to exert influence on prescribing via formularies, the need for agile, targeted communication of access conditions will only grow. Tools like FormTrak show how pharmaceutical companies can adapt, ensuring that **market access wins translate into patient access realities**. By simplifying the complexity of payer data into digestible, actionable insights for field teams, FormTrak ultimately helps more patients benefit from the therapies available to them – a goal shared by all participants in the healthcare system.

Sources: This white paper incorporated insights and data from MMIT's product literature and case studies, Veeva partnership information, and testimonials from early users of FormTrak. Key references include MMIT's official FormTrak brochure and website ([Link](#)) ([Link](#)), an AIS Health Spotlight interview on the Veeva integration ([MMIT Integrates FormTrak Market Access Tool with Veeva CRM – AIS Health – MMIT](#)) ([MMIT Integrates FormTrak Market Access Tool with Veeva CRM – AIS Health – MMIT](#)), and real-world usage scenarios documented by MMIT ([FormTrak | Promotional | MMIT](#)) ([MMIT Integrates FormTrak Market Access Tool with Veeva CRM – AIS Health – MMIT](#)). These sources attest to the capabilities and benefits described, providing a grounded basis for understanding how FormTrak functions and delivers value in practice.