Veeva PromoMats: The Complete Guide for Pharma Marketers, Sales Reps, and MSLs

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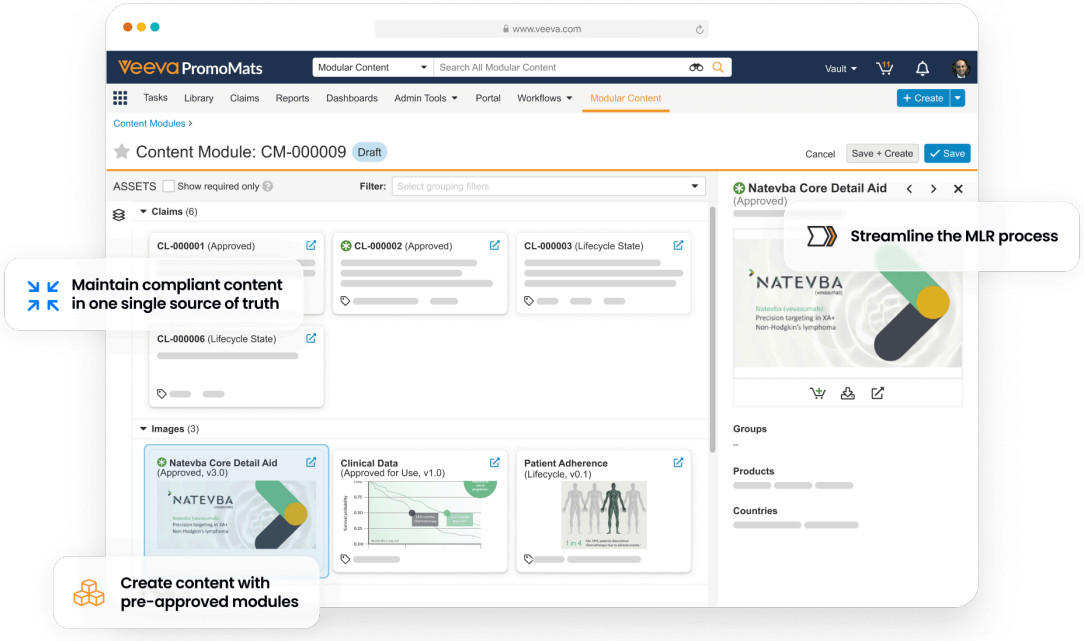

Veeva PromoMats: The Complete Guide for Pharma Marketers, Sales Reps, and MSLs

Veeva Vault PromoMats is a cloud-based content management application designed specifically for the life sciences industry to manage and distribute **promotional materials and commercial content** in a compliant manner (Optimizing Pharma Content Management with Veeva Vault: PromoMats, MedComms, DAM & RIM). Part of the Veeva Vault platform, PromoMats supports the **entire content lifecycle** of promotional assets – from content creation and review through approval, distribution, and eventual withdrawal – while ensuring rigorous **regulatory compliance** at every step (Veeva PromoMats | Compliant Promotional Content Management | Veeva) (Link). It combines robust **digital asset management (DAM)** capabilities with specialized **medical, legal, and regulatory (MLR) review** workflows, serving as a single source of truth for all promotional content within pharmaceutical and biotech organizations (Optimizing Pharma Content Management with Veeva Vault: PromoMats, MedComms, DAM & RIM) (Veeva PromoMats | Compliant Promotional Content Management | Veeva). Widely adopted across the industry (trusted by over *450* biopharma companies (Veeva PromoMats | Compliant Promotional Content Management | Veeva)), Veeva PromoMats has become a cornerstone for marketing and medical teams aiming to streamline content operations and maintain compliance in the highly regulated pharma environment.

What is Veeva PromoMats?

Veeva PromoMats (often referred to as **Vault PromoMats**) is Veeva Systems' solution for **compliant promotional content management** in life sciences. In essence, it is a **content repository and workflow system** that enables companies to **create, approve, store, and distribute promotional materials** (e.g. brochures, detail aids, emails, presentations, websites, videos) under a controlled, compliant process (Optimizing Pharma Content Management with Veeva Vault: PromoMats, MedComms, DAM & RIM) (Optimizing Pharma Content Management with Veeva Vault: PromoMats, MedComms, DAM & RIM). The platform is delivered as a **cloud-based SaaS (Software-as-a-Service)** application built on the Veeva Vault platform, meaning it is accessible via web browser by users worldwide and does not require on-premise servers (Link). All teams – including marketing, sales, medical, legal, and regulatory – can collaborate within PromoMats's unified environment, ensuring that promotional content goes through the proper **medical, legal, and regulatory (MLR) review process** before it's approved for use (Optimizing Pharma Content Management with Veeva Vault: PromoMats, MedComms, DAM & RIM). By automating and tracking the **end-to-end process** of content development, Veeva PromoMats helps organizations reduce compliance risks, speed up content release cycles, and maintain consistency of messaging across markets.

Some key characteristics of Veeva PromoMats include:

- **Industry-Specific Focus:** Purpose-built for **pharmaceutical, biotech, and medical device** promotional content, with features to meet industry regulations and guidelines (e.g. FDA, EMA rules for promotional materials).
- **Integrated DAM and Approval System:** Combines a full **digital asset management** repository with an **MLR approval workflow**, so users have one platform for both managing assets and handling approvals (Optimizing Pharma Content Management with Veeva Vault: PromoMats, MedComms, DAM & RIM).
- **Cloud-Based & Global:** Provided as a **cloud service**, allowing instant access for internal teams and external partners anywhere in the world. This simplifies collaboration (no local installs needed) and supports globally

dispersed marketing teams and agencies working on content concurrently (Link).

- **Regulatory Compliance at Core:** Enforces **compliance controls** like audit trails, electronic signatures, and regulated workflows out-of-the-box to help meet requirements such as **21 CFR Part 11** (electronic records/signatures) and other global marketing compliance standards. It even supports automatic generation of required regulatory submission forms (like FDA Form 2253 in the U.S.) for approved promotional pieces (PromoMats Overview | Vault Help).
- **Seamless Integration:** Connects with other systems (especially **Veeva CRM** and multichannel platforms) to automatically distribute approved content and ensure only the latest approved materials are used in the field (Veeva PromoMats | Compliant Promotional Content Management | Veeva). It also provides APIs for integrating with third-party tools (web content management, campaign management, etc.), fitting into a company's broader digital ecosystem.

In summary, PromoMats is the **central hub for managing promotional content** in a compliant way. Marketers use it to create and organize assets, **MLR teams use it to review and approve content**, and field teams (sales reps and MSLs) rely on it to access the latest approved materials for use with healthcare providers. The following sections dive deeper into PromoMats' core features, technical capabilities, and how it supports various roles in pharma commercial and medical teams.

Core Features and Capabilities

Vault PromoMats comes with a rich set of features tailored to the needs of life sciences promotional content management. These features span content creation, collaborative review, asset management, compliance enforcement, and more. Below we explore the platform's core capabilities:

Content Management and Digital Asset Management (DAM)

At its heart, PromoMats provides a **central content repository** with robust digital asset management features designed for life sciences. All promotional materials – from documents (like detail aids, leave-behinds) to rich media (graphics, videos) – are stored and managed in a **globally accessible library**. The system not only stores the final approved files, but also **original source files, artwork, and all versions** of each asset (Link). This means a marketing team can store a PowerPoint master file or an Adobe InDesign source alongside the approved PDF, ensuring nothing gets lost and facilitating updates.

Key content management capabilities include:

- **Version Control:** Every time a document is edited or updated, PromoMats automatically creates a new version. Prior versions are retained and auditable, while users always see the current approved version by default. This automated versioning and history tracking maintains a complete **audit trail of changes** over the content's lifecycle (PromoMats Overview | Vault Help). It helps teams understand what changed, when, and by whom – critical for both collaboration and compliance auditing.
- **Metadata and Organization:** Content in PromoMats is tagged with rich metadata (e.g. product, therapeutic area, country, content type, expiration date, etc.). The data model even provides specific object types like *Product*, *Country*, and *Applicant (responsible company)* to categorize materials in a way that aligns with regulatory needs (PromoMats Overview | Vault Help). This metadata-driven approach enables powerful searching and filtering – users can quickly find all assets for a specific product or market, for example.
- **Built-in DAM for Reuse:** PromoMats includes built-in **Digital Asset Management** capabilities so teams can **store and reuse assets** easily (Veeva PromoMats | Compliant Promotional Content Management | Veeva) (Link). All images, logos, videos, and documents are consolidated in one place, making it easy to find approved graphics or content snippets to

repurpose in new materials. Global marketing teams can pull from this repository instead of reinventing assets for each new project, **promoting content reuse and brand consistency**. According to Veeva, this DAM approach has led to a ~40% growth in content reuse with a modular content strategy (Veeva PromoMats | Compliant Promotional Content Management | Veeva).

- **Brand Portal:** PromoMats offers a feature called **Brand Portal**, essentially a curated "storefront" for content. In Brand Portal, brand managers can select and share specific approved content with their teams through a simplified interface (PromoMats Overview | Vault Help). For example, a Brand Portal might showcase the latest approved assets for a particular product – enabling sales reps or affiliates to easily download what they need. This fosters global **brand alignment** by allowing markets to share and leverage each other's content, reducing duplicate work (PromoMats Overview | Vault Help) (Link).

Overall, the content management and DAM features ensure that **everyone works from a single source of truth**. Users can trust that the repository holds only the latest approved materials (older versions are archived but not accidentally used), and they can efficiently find or reuse content components, saving time in content creation and maintaining consistency across channels and geographies.

Medical-Legal-Regulatory (MLR) Approval Workflows

One of the defining capabilities of Veeva PromoMats is its **MLR review and approval workflow**, which addresses the stringent **medical, legal, and regulatory review process** required for pharma promotional materials. PromoMats provides out-of-the-box workflow templates and tools that streamline how content gets reviewed, commented on, revised, and ultimately approved:

- **Configurable Workflow Processes:** Companies can configure review workflows to mirror their internal **approval processes**. PromoMats comes with industry-specific best-practice workflows (for example, a sequential review by Medical, then Legal, then Regulatory), but these can be tailored. You can define multiple rounds of review, parallel or sequential stages, and required approvers or quality check steps as needed (PromoMats Overview | Vault Help) (PromoMats Overview | Vault Help). This flexibility allows adapting to local market processes or internal SOPs while still using a controlled workflow.
- **Task Assignments and Notifications:** When content is sent for review, the appropriate reviewers (medical advisors, legal counsel, regulatory affairs, etc.) get tasks assigned. They can be notified via email and within the system, ensuring no step is missed. Coordinators or project managers can oversee the process, scheduling review meetings and tracking status within PromoMats.
- **Online Review & Annotation:** Reviewers perform their work directly in the PromoMats UI. The platform offers a **document viewer** where reviewers can see the content (including video or interactive content) and add annotations or comments in real-time. This supports collaborative review – multiple reviewers can annotate simultaneously, and everyone sees consolidated feedback. *Real-time annotation* and commenting features mean Medical, Legal, and Regulatory can all mark up a draft at the same time during a meeting or asynchronously (PromoMats Overview | Vault Help).
- **Automated Versioning & Audit Trail:** Each review cycle and edit is captured. PromoMats automatically versions the document when changes are made, maintaining prior versions for reference (PromoMats Overview | Vault Help). An **audit trail** logs every action – who reviewed, who approved or rejected, and when – creating a complete compliance record. Features like **electronic signatures** can be required at approval steps, capturing 21 CFR Part 11-compliant e-signatures for approvers to formally sign off (PromoMats Overview | Vault Help). This ensures a clear chain of custody and accountability throughout the review process.

- **Outcome Management:** If reviewers request changes, the content can be sent back to the owner/agency for updates (with all comments recorded). Once all reviewers give approval, the system can automatically promote the content to an "Approved" state. PromoMats can also enforce that **only approved content** can move forward to distribution channels, blocking unapproved drafts from any unintended use.
- **MLR Efficiency Tools:** Veeva has introduced AI-assisted features (like an "MLR Bot" for preliminary review) to speed up compliance checks, and the platform allows reviewers to search within the document, compare versions side-by-side, and utilize reference links (for claims) to make review faster (PromoMats Overview | Vault Help) (PromoMats Overview | Vault Help). All these help reduce the time spent in MLR meetings and cycles – in fact, companies report significant reductions in review cycle time (57% in some cases) by using an integrated system like PromoMats (Link).

By automating and tracking the MLR process, PromoMats **ensures that no promotional content reaches the field without proper approval**. The workflows not only enforce compliance (every piece must get the required sign-offs with evidence in the audit trail), but they also make life easier for reviewers by centralizing all needed information. For instance, reviewers can easily access **embedded reference documents or claims** within the piece via document linking, ensuring that each claim in an ad is backed by an approved reference (PromoMats Overview | Vault Help). This level of integration between content and its substantiating references is crucial in pharma, where every statement must be accurate and supportable.

Modular Content and Claims Management

Modern content strategies in pharma are increasingly turning to **modular content**, and Veeva PromoMats provides capabilities to support this approach. **Modular content** is the practice of assembling and reusing pre-approved components (modules) to rapidly create new materials. Each module could be a block of text, an image, a data chart, or any discrete piece of content that can stand on its own. PromoMats treats these modules as individual content items

that can be created, managed, and approved independently, then pulled into larger documents or presentations.

- **Definition of Modular Content:** *"Modular content is the process of assembling and reassembling pre-approved components, or 'modules', into different types of content for use across regions and channels."* (Veeva PromoMats – Modular Content | Veeva). In PromoMats, a marketing team might create a library of modules – for example, a core efficacy claim with an accompanying graphic and reference, a safety statement, a product description blurb, etc. – and get each module approved by MLR once. These modules can then be reused in various combinations to quickly build new assets (emails, detail slides, etc.) without needing a full MLR review from scratch each time (Modular Content in Pharma | Veeva).
- **Efficiency Through Reuse:** The benefit of this approach is huge efficiency gains. Instead of requiring a **full review for every new piece**, modules that are already approved can be dropped into new materials, so reviewers only need to focus on any new or changed content. As one Veeva resource notes, with modular content, *"the individual content modules themselves can go through an MLR review at the outset. Then, new assets can reuse these pre-approved content modules so that by the time the asset goes to MLR for review, a large portion of the content is already approved"* (Modular Content in Pharma | Veeva). This reduces bottlenecks and speeds up content creation dramatically.
- **Claims and Reference Management:** Alongside modular content, PromoMats provides **claims management** capabilities. *Claims* are the statements or messages used in promotional content (e.g. "Drug X reduces risk of stroke by 35%"). In PromoMats, companies can maintain a **central claims library** – each claim can be stored as an object with its approved wording and linked reference support (e.g. a clinical study). These claims can be referenced by multiple assets. If a claim gets updated or retracted, PromoMats can automatically flag all materials using it. The system even offers **automatic claims linking** tools: for instance, if a user is creating a piece and inserts a claim statement, they can use a "Suggest Links" function to automatically link the correct reference from the library

(PromoMats Overview | Vault Help). This ensures promotional content is scientifically accurate and **fully supported by citations**, which is a key compliance requirement. By managing claims centrally, organizations ensure consistency (everyone uses the same approved language) and can **make global updates** easily if needed.

- **Content Localization and Variation:** Modular content also helps with localization. A set of global modules can be developed (for a core campaign, say), and local marketing teams can assemble those into country-specific materials, adding any local required content. Since modules can be tagged by country/region or language, PromoMats can help manage variations across markets while maintaining control over the core content. Moreover, PromoMats supports **country-specific regulatory workflows** – for example, automatically including a self-certification step for the UK, or generating a Form FDA 2253 for the US – so that even as modules are reused globally, local regulatory needs are met (PromoMats Overview | Vault Help).

In short, **PromoMats enables a modular content strategy** that speeds up content production and improves consistency. Marketers benefit by being able to produce personalized, multichannel content faster (by mixing and matching approved blocks), and compliance teams benefit because content built from pre-approved modules inherently carries less risk. This capability is increasingly important as pharma companies move toward an **omnichannel engagement** model, requiring lots of content variations for different channels but with consistent core messages.

Compliance Features and Audit Trails

Compliance is the foundation of PromoMats – every feature is designed with the stringent regulatory environment of life sciences in mind. In addition to the workflow and claims management already discussed, the platform includes specialized compliance and auditing capabilities to satisfy internal compliance teams and external regulators:

- **Full Audit Trails:** Every action in PromoMats is recorded. There is a **detailed audit trail** for each document, capturing events like uploads, edits, reviews, approvals, version changes, and distributions. This audit log can be exported or shown to demonstrate compliance during audits. It provides visibility into **who did what and when**, which is vital for compliance with regulations like FDA 21 CFR Part 11. (In fact, PromoMats' audit trails and e-signatures are designed to be *21 CFR Part 11 compliant*, ensuring electronic records are trustworthy and equivalent to paper records (PromoMats Overview | Vault Help).)
- **Electronic Signatures:** As part of approvals, authorized users provide electronic signatures within the system. Each signature is linked to the user's identity, timestamped, and recorded in the audit trail, with a *manifestation* (signature meaning) captured (e.g. "Approved for Release") to meet regulatory guidelines. This ensures that an electronic approval in PromoMats holds up as a formal, compliant sign-off, just as a physical signature would.
- **Automated Compliance Checks:** PromoMats has features to enforce business rules like requiring certain metadata or reviews. For example, the system can prevent a submission of content for approval unless required fields (like the product and intended country use) are filled out. It can also automatically **generate regulatory forms** – notably, for the U.S., PromoMats can auto-generate **FDA Form 2253** (the form used to submit promotional materials to FDA) upon approval of a piece (PromoMats Overview | Vault Help). This saves regulatory teams time and ensures no promotional piece is forgotten for submission. Additionally, PromoMats can bundle content and metadata into an **eCTD (electronic common technical document) package** for health authority submissions, aligning with the latest regulatory requirements for electronic submissions.
- **Expiration and Withdrawal Controls:** A key compliance need is to ensure that outdated or expired promotions are not used. PromoMats allows setting **expiration dates** on content (after which the content is no longer considered valid for use). The system provides **single-click withdrawal** of assets from use: if an asset is expired or needs to be pulled (due to new

safety info or updated data), a content manager can withdraw it in PromoMats, and that will automatically make it unavailable to the field and any integrated channels (Link). This prevents reps from accidentally using old materials. PromoMats thus helps maintain **control of assets through their entire lifespan**, ensuring only current, approved materials are in circulation (Link).

- **Audit Readiness:** Because all content, reviews, references, and approvals live in one system, it becomes much easier to **demonstrate compliance** to internal auditors or regulators. If a regulatory agency asks for the approval history of a particular advertisement, the company can quickly retrieve the document record from PromoMats showing the approval dates, approvers, the exact approved content, and even the references linked to each claim. This level of organization significantly reduces the effort of compliance reporting. One customer case noted that teams could "easily find requested documents or demonstrate compliance with 21 CFR Part 11 compliant e-signatures and audit trails" when using Vault PromoMats (Medicines360 Takes Control of Regulated Content with Vault ...).

PromoMats' compliance features collectively address the major challenges of **regulated content management**: making sure every piece of content is reviewed, approved, used within its valid period, and tracked. This greatly reduces the risk of a non-compliant promotional activity (like an outdated claim being shown) and provides peace of mind that **regulatory obligations (submissions, record-keeping)** are being met in the background.

Content Distribution and Withdrawal

Once content is approved in PromoMats, organizations need to get it to the field and to various channels where it will be used. One of the strengths of PromoMats is how it streamlines **distribution of approved content** and ensures that distribution is controlled. It acts as the publishing source for multiple downstream channels:

- **Multichannel Publishing:** PromoMats can **push approved content directly to different channels** such as Veeva CRM (for field reps' iPad presentations), company websites, email platforms, and even print distribution systems (PromoMats Overview | Vault Help) (PromoMats Overview | Vault Help). It has built-in integrations for **Veeva CRM Closed Loop Marketing (CLM)** and **Approved Email**, meaning that when a piece of content is marked approved and "publishable" in PromoMats, it can automatically sync to the CRM system for sales reps to use (Veeva PromoMats | Compliant Promotional Content Management | Veeva). For example, a new detail aid PDF or an HTML5 interactive presentation can be published to the Veeva CRM Media Library (so reps get it on their tablets), and an approved email template can be published to the Approved Email library for reps to send out. This eliminates manual hand-offs like emailing files to reps or uploading content into separate systems – it's **one-click publishing** from the vault to the field.
- **Web and Remote Channels:** Through its API and specific features like **Web Content Management integration** and **Engage** (Veeva's remote detailing platform), PromoMats can deliver content to websites or remote meeting tools. Veeva's **Public Content Distribution** feature even allows embedding an external viewer for content on a website, so HCPs or consumers can view the latest approved version of a document directly from the vault (PromoMats Overview | Vault Help). This ensures that if an asset is updated in PromoMats, the website automatically shows the new version – maintaining compliance without webmasters needing to constantly replace files.
- **Withdrawal & Automatic Expiry:** As noted in the compliance section, distribution is always paired with the ability to **withdraw** content. If a piece is expired or recalled, marking it as "Withdrawn" in PromoMats will propagate that status to connected channels. For instance, if a detail aid is withdrawn, the next sync with Veeva CRM will remove it from the reps' device libraries. This happens seamlessly, often with "single-click" by the content manager (Link). Automatic expiration settings further ensure content comes down when its valid period ends. This tight control means

field personnel will never accidentally use unapproved or outdated materials – a critical compliance safeguard.

- **Traceability of Distribution:** PromoMats keeps track of where content has been distributed. Each document's record can show if it's been published to CRM, shared via email, or exposed on a website. Moreover, integration with Veeva CRM means that usage data flows back: for example, if reps send an approved email (which contains a Vault document link), PromoMats/CRM can track that distribution event. This allows marketers to see **which content is being used and how often**, and even which content has been seen by which HCPs (since CRM records interactions) (PromoMats Overview | Vault Help). Such traceability is important both for compliance (e.g. knowing exactly which doctors received a particular promotional piece if needed for an audit) and for **analytics** (gauging content effectiveness).

In summary, PromoMats doesn't just manage content inside a vault – it actively **deploys content to end users (reps, MSLs, websites)** and ensures that deployment is always current. By automating multichannel distribution and withdrawal, it *streamlines the content supply chain*: approved assets flow rapidly to where they need to be, and outdated assets are swiftly removed, all with minimal manual effort.

Integration with Veeva CRM and Other Systems

Veeva PromoMats is a part of the broader Veeva Commercial Cloud, so it's designed to work hand-in-glove with **Veeva CRM**, which is widely used by pharma sales teams and MSLs for customer interactions. This integration is one of the most valued aspects of PromoMats, as it closes the loop between content creation and field use. Additionally, PromoMats offers integration capabilities with other enterprise systems:

- **Veeva CRM Integration:** PromoMats connects to Veeva CRM to enable true **end-to-end content usage**. When connected, any promotional content approved in PromoMats can be automatically pushed to the CRM's relevant modules. Specifically, Veeva CRM's **CLM (Closed Loop Marketing)** module

will receive presentation slides and digital content, and **Approved Email** in CRM will receive email assets/templates (Veeva PromoMats | Compliant Promotional Content Management | Veeva) (PromoMats Overview | Vault Help). Sales reps and MSLs using the CRM app then have immediate access to the latest content on their iPad or laptop. Moreover, this integration ensures that reps **can only use approved content** – since the CRM will only contain what PromoMats provided. The integration also sends usage data back: for instance, if a rep emails a piece of content to a doctor via Approved Email, that event is logged along with content ID, so marketing can see content distribution metrics (PromoMats Overview | Vault Help). In essence, the CRM integration turns PromoMats into the content source for field interactions and tracks content usage as part of customer engagement history.

- **Rep-Triggered Emails:** Through the Approved Email integration, **sales reps or MSLs can trigger emails to HCPs that contain approved content**. They select an email template or content piece (which was approved and stored in PromoMats), perhaps personalize a short message, and send it to the healthcare professional from the CRM. Because PromoMats provided the content, the system ensures it's the latest approved version and even controls that the rep cannot edit the core content. This "rep-triggered email" capability is extremely useful for follow-ups (e.g., sending a doctor the latest brochure or a clinical reprint after a meeting) and is fully compliant since the content is pre-approved and the send is tracked (PromoMats Overview | Vault Help).
- **Other Veeva Integrations:** PromoMats also integrates with **Veeva Engage** (for remote meetings) and **Veeva Events Management**. Engage integration allows the same CLM content to be used in virtual meetings with HCPs. Events Management integration enables content to be prepared in Vault for specific events (like conference booths or speaker programs) and then used in the context of those events via CRM (PromoMats Overview | Vault Help). These ensure that whether reps meet HCPs in-person or virtually or at events, the content they use comes from the single PromoMats source.

- **APIs and Third-Party Systems:** Beyond Veeva's own ecosystem, PromoMats has an open **REST API** that allows integration with other tools. For example, a company might connect PromoMats with their corporate **website CMS** or a **marketing automation system**. The PromoMats API lets external systems query or retrieve approved content, meaning you could, say, pull the latest approved product images or descriptions from PromoMats into a local country website automatically (Veeva PromoMats | Compliant Promotional Content Management | Veeva). Similarly, some organizations integrate PromoMats with external **digital asset management systems** or analytics tools. While PromoMats includes its own DAM and analytics, it can export or expose data to other enterprise systems if needed. In practice, many pharma companies use PromoMats as the central content backbone and tie it into creative agency tools or localization workflows (agencies might upload content directly to PromoMats via a secure link, etc.).
- **Veeva MedComms and Medical Systems:** Although our focus is on PromoMats, it's worth noting that Veeva offers a sister product, **Vault MedComms**, for medical communications content (like medical information letters, FAQs, etc.). PromoMats and MedComms are separate but complementary – and some companies integrate them. For example, if an MSL wants to access a standard response letter (MedComms content) and a promotional slide deck (PromoMats content), both can be accessible via Veeva CRM or a unified interface. Veeva's platform approach allows sharing content across vaults if needed, but usually each vault serves its specific purpose (PromoMats for promo, MedComms for medical content) (Optimizing Pharma Content Management with Veeva Vault: PromoMats, MedComms, DAM & RIM). Nonetheless, they both integrate with CRM, so from a field user's perspective, it can feel seamless.

Integration capabilities make PromoMats a **connected part of the commercial tech stack**. By linking content management with CRM and other channels, Veeva ensures that **approved content flows to every channel where it's needed without manual work**, and that usage data flows back for analysis. This

tight integration is a major advantage over siloed content systems, especially in pharma where compliance and timeliness are critical.

Reporting and Analytics

An often overlooked but important capability of PromoMats is its **reporting and analytics** features. Given that PromoMats manages the content lifecycle, it can provide valuable insights into the content operations and effectiveness. The platform includes out-of-the-box reports and also allows custom report creation on various data points:

- **Operational Metrics:** PromoMats can report on the **content pipeline and workflow metrics**. For example, you can track how many assets are in review, how long each review cycle takes, how many revisions an asset went through, and identify bottlenecks in the MLR process. There are reports that show the **average number of review cycles by product or by content type**, the average time each reviewer takes, etc. These help in process improvement – e.g., if one type of content consistently requires many rework cycles, maybe the initial brief can be improved, or if one functional group is causing delays, perhaps more training or resources are needed. In fact, PromoMats now offers **benchmarking** through something called Veeva Pulse Content Metrics, allowing companies to compare their content cycle times and efficiency against industry averages (Veeva PromoMats – Reports | Veeva) (Veeva PromoMats – Reports | Veeva).
- **Content Usage Analytics:** Through its integrations (particularly with CRM), PromoMats can help track **how content is used by the field and engaged by HCPs**. For instance, marketing can run a report to see which detail aids or slides have been presented the most by the sales force, or which approved emails have been sent out and their open rates (this latter info comes from Veeva CRM's tracking of email opens by HCPs). PromoMats might not track the open rates internally, but by linking to CRM data it provides a holistic view. These insights allow marketing teams to measure the **effectiveness of materials** – if one piece is rarely used by reps,

perhaps it's not useful and can be replaced; if one brochure is heavily used and also frequently opened by doctors, that's a success story to emulate.

- **Asset Library Insights:** The system can also report on the asset library itself – how many assets are currently approved, how many are nearing expiration, usage of the content modules, etc. For example, a **"Where Used" report** can show all materials in which a particular claim or asset is used, which is helpful if that claim needs updating (Link). There are also insights on content reuse (to quantify the impact of modular content) and on asset localization (e.g., how many local markets reused the global core materials).
- **Dashboards:** PromoMats allows creating **real-time dashboards** that compile key metrics. A content operations manager might have a dashboard that shows content status breakdown (X in draft, Y in review, Z approved), average days in review for the last quarter, and upcoming expirations. These dashboards update automatically and help teams stay on top of content throughput. The interface provides configurable charts and graphs for visualization.
- **Export and BI Integration:** If deeper analytics are needed, data from PromoMats can be exported to business intelligence (BI) tools or data warehouses. Veeva also has products like **Veeva Nitro** (a data warehouse for Veeva data) which can pull Vault PromoMats data and allow advanced analysis across sources. However, even within PromoMats itself, the provided **reporting suite is quite extensive**, giving most users the insight they need to make informed decisions (Veeva PromoMats – Reports | Veeva). For example, you can demonstrate to senior management how content speed-to-market has improved by showing the reduction in review times after implementing PromoMats, or show compliance improvements by reporting zero incidents of expired content being used.

In essence, PromoMats not only helps manage content but also enables a **continuous improvement loop**: teams can analyze the data on how content is being created and used, then optimize their processes or strategy accordingly. This analytics capability elevates the content function from a reactive service to

a more strategic role, as marketers and operations teams gain data-driven insights into their promotional strategy's effectiveness.

User Interface, Permissions, and Role-Based Access

Veeva PromoMats is designed for a wide range of users – from marketers and brand managers, to medical reviewers, to sales reps and external agencies. To accommodate this, it provides a flexible **user interface with role-based access controls** so that each user sees and can do what they need, and nothing more. A quick overview of how PromoMats handles the user experience and permissions:

- **Vault UI:** The core user interface of PromoMats is part of the Veeva Vault web application. It's a modern web UI accessible via browser. Users log in (often via single sign-on in companies) and can navigate through tabs/sections for **Library (assets)**, **Dashboard/Reports**, **Workflow tasks**, etc. The interface allows previewing documents, uploading new files by drag-and-drop, editing metadata fields via forms, and performing actions (like sending for review) with buttons or menus. The UI is designed to be intuitive even for non-technical users, and can be configured to show custom fields or workflows specific to the company's configuration.
- **Role-Based Access Control:** PromoMats uses a robust permission model where each user is assigned one or more **roles** (or profiles) that determine what they can see and do. For example, an **Agency User** (external ad agency partner) might have a role that allows them to upload and edit draft content but not see any content outside their project or not initiate approvals (PromoMats Overview | Vault Help). A **Brand Manager** might have owner rights on their product's documents, giving them broad control (view, edit, submit for review, etc.) (PromoMats Overview | Vault Help). **Medical/Legal/Regulatory reviewers** have roles that allow them to see the content in review and make annotations, but they typically cannot modify the original document – they can only comment and approve/reject (PromoMats Overview | Vault Help). This ensures separation of duties; for

instance, a reviewer cannot accidentally change content, they can only request changes which the owner or agency must implement.

- **Granular Permissions:** Vault's security model goes down to the level of object types, documents, fields, and even individual pieces of content. Security **profiles** and **rules** can restrict access by product, country, document type, etc. For example, a user from the EU team might not even see content that is US-specific. Or a legal reviewer might see all content for a given market but only in the review state. These controls are configurable by the system admin to match organizational boundaries. All of this ensures **confidential content stays restricted** and users are not overwhelmed with irrelevant information.
- **External Collaboration:** PromoMats is built to include external parties in a controlled way. Companies often give external creative agencies access to PromoMats to upload drafts directly, which speeds up content development. Vault offers special license types and security setups for these scenarios – e.g., an **agency user** can log in to a specific vault and only see the projects assigned to their agency, with capabilities limited to adding new content and perhaps viewing the status (PromoMats Overview | Vault Help). They would not have access to sensitive internal documents or other products' content. This external collaboration means fewer emails/FTP transfers of files and a **single platform for all content work**, even across company boundaries.
- **User Interface for Field Users:** While most of the PromoMats interface is used by content managers and reviewers, field users like sales reps or MSLs typically access content through **Veeva CRM's interface (on iPad or laptop)** rather than directly logging into PromoMats. However, there are scenarios where a field user might use a web portal (like a Brand Portal or a content portal) to find content. The Brand Portal feature we discussed provides a very simplified UI specifically for users who just need to download or browse approved content. It removes the complexity of the full vault UI and presents a curated catalog of assets for that user's role (PromoMats Overview | Vault Help).

- **Cloud and Updates:** Because PromoMats is cloud-based, the UI and features are updated several times a year by Veeva (typically 3 major releases annually). Users automatically get new improvements (after the company's admin validates them) without needing software installs. The cloud infrastructure also means performance is managed by Veeva – even with thousands of users globally, the system is scalable and accessible. It's hosted in secure data centers with compliance certifications, and companies don't need to worry about the underlying hardware or security patches.

From a user perspective, PromoMats aims to be the one-stop shop for managing content. The **permissions model** ensures each stakeholder – whether a marketer, reviewer, or agency partner – has an interface and privileges tailored to their needs, which improves adoption and compliance. By tightly controlling access and providing an easy-to-use interface, PromoMats helps teams work together efficiently without compromising on security or regulatory requirements.

Use Cases in Practice

Veeva PromoMats delivers value across different roles in pharma companies. Below are some use cases and scenarios illustrating how **marketers**, **pharmaceutical sales representatives**, and **medical science liaisons (MSLs)** can leverage the platform in their day-to-day activities:

How Marketers Use PromoMats

Marketing teams (which include product managers, brand managers, marketing communications, etc.) are primary users of PromoMats. They rely on it to plan, create, and disseminate promotional content efficiently:

- **Content Planning and Creation:** A marketer (often working with a creative agency) will use PromoMats as the starting point for any new campaign

material. For example, when preparing a launch for a new drug, the brand manager can create a project folder in PromoMats and have the agency upload draft pieces directly to it. Everyone works off this central platform. Marketers can ensure that agencies use the latest approved assets by pointing them to the Brand Portal for logos or previously approved claims, thus speeding up the creation process and keeping content on-brand.

- **Efficient Review Management:** Marketers coordinate the MLR review of their assets via PromoMats. Instead of endless email threads and manual document versions, they initiate a workflow in the system. They can track the status in real-time – seeing who has approved, who is still reviewing – and send reminders if needed. This transparency reduces follow-up emails. If legal has an issue with a claim, they annotate it in PromoMats; the marketer gets an automatic notification of the change request and can iterate with the agency. The whole cycle is visible and traceable, which greatly streamlines what traditionally is a cumbersome process.
- **Faster Time-to-Market:** By using features like modular content, marketers can assemble new materials quickly. Suppose a competitor launches a new study and the marketing team needs a revised pamphlet highlighting their own drug's differentiators. Using PromoMats, they can pull in pre-approved modules (efficacy data, safety profile, etc.) and only have to get the new comparative claim reviewed. This agility means marketing campaigns can respond faster to market changes. Veeva reports that companies have seen over 50% faster speed to market for content after adopting PromoMats and modular content approaches (Veeva PromoMats | Compliant Promotional Content Management | Veeva).
- **Multi-Channel Release:** Once content is approved, marketers can with a few clicks distribute it to all needed channels. For instance, after an HCP webinar deck is approved, the marketer uses PromoMats to push it to the rep iPads (so sales can start using it in meetings) and simultaneously update the HCP portal website with the same content for on-demand viewing. This coordinated release ensures **consistent messaging across channels** and saves the marketer from having to separately coordinate with web teams or sales ops – PromoMats handles the dissemination.

- **Ensuring Compliance & Readiness:** Marketers also appreciate that PromoMats enforces discipline. They cannot accidentally skip the legal review or use an outdated file; the system won't let them. It will remind them when an asset is nearing expiration so they can plan an update or renewal. It will generate the FDA submission package so they can file their 2253 form immediately upon first use of the material. All of this means the marketing team can focus more on strategy and content quality, with PromoMats acting as a safety net for compliance.
- **Analytics for Optimization:** After distribution, marketers can look at reports to see how content is performing. For example, they might see that a particular infographic in their detail aid is rarely shown by reps, indicating it might not be resonating or is hard to find in the flow. Such insights might lead them to reorder the slides or create a training for reps on that piece. They can also aggregate how many times a piece was used or sent via email, demonstrating ROI for content creation efforts. These feedback loops help marketing continuously refine their content strategy.

In short, PromoMats for marketers is about **streamlining the promotional content supply chain** – from creation to approval to deployment – so that campaigns can launch faster and run smoother, without falling afoul of compliance rules. It turns what could be a chaotic process into a more **orchestrated, efficient one**, freeing marketers to be more agile and creative within a compliant framework.

How Pharma Sales Reps Use PromoMats Content

For **pharmaceutical sales representatives**, PromoMats is behind the scenes but critically important. Reps may not log into PromoMats directly (they primarily use Veeva CRM on their devices), but the content they use in the field is managed and delivered by PromoMats. Here's how PromoMats supports sales reps:

- **Access to Latest Promotional Materials:** A sales rep typically uses a tablet (e.g. an iPad) with a CRM app to show presentations (detail aids) to

doctors or to send approved emails. Thanks to PromoMats integration, the rep can be confident that **the materials on their device are always the latest approved versions** (Link). When they connect their iPad to the network, the Veeva CRM app automatically syncs with PromoMats and fetches new or updated content. For example, if a slide deck was updated to include new clinical data, once approved and published via PromoMats, it will appear in the rep's library and the old version will be removed. This ensures reps don't inadvertently use outdated brochures – a huge compliance safeguard.

- **Approved Email and Follow-ups:** Reps often want to follow up a face-to-face meeting by sending an email with additional information (for instance, a PDF of a study or a patient brochure). PromoMats makes this seamless and compliant through **Approved Email**. The rep selects from pre-loaded, approved email templates or content pieces in the CRM, which are there because PromoMats supplied them (PromoMats Overview | Vault Help). They can personalize a greeting but cannot change the core content. When they hit send, the email content (which resides as a Vault document) is sent to the HCP. Because it's all templated and approved, this protects the rep from accidentally writing something non-compliant. And the rep can see in CRM if the doctor opened the email, giving them feedback for follow-up.
- **Compliance in the Field:** Sales reps are primarily focused on engaging HCPs, so they need to trust that the tools they are using keep them compliant. PromoMats' integration means reps *cannot* go rogue even if they wanted to – they can't use a presentation that hasn't gone through MLR, because it simply won't be available in their app. If they try to use an expired piece, it will have been removed. If an HCP asks a question and the rep wants to provide some material, the rep can only send what's in the Approved Email library. This structure actually gives reps peace of mind, letting them focus on the customer interaction rather than worry whether a piece is okay to use. It **ensures compliance on the front line ("in the field")** without the rep needing deep knowledge of all the regulatory nuance.

- **On-Demand Content and Withdrawal:** Consider a scenario: a rep is detailing a doctor and the doctor mentions a recent journal article. The rep remembers that the company just approved a reactive slide about that topic yesterday. In old setups, the rep might not get that slide until the next week's email from marketing or might not have it at all. With PromoMats, as soon as that slide was approved and published, it's available. The rep can sync their CRM app and instantly have the new content to use, even on short notice, thus appearing very responsive and up-to-date. Conversely, if a safety issue arises and certain content must be retracted, PromoMats will pull it from their device, preventing any future use. The rep might notice it disappeared, and perhaps get a notification that content was withdrawn – they are thus kept in lockstep with what's approved.
- **Content for Remote Engagements:** In today's environment, reps also engage HCPs remotely (via Zoom-like calls or Veeva Engage). PromoMats enables reps to use the same approved CLM content in a remote meeting. The rep can share content through Engage (which is drawing from PromoMats). Or they can send a link to a web-based content piece for the doctor to view later, using secure content sharing that PromoMats powers (PromoMats Overview | Vault Help). This extends their reach and provides more channels to use content, all while remaining compliant.
- **Training and Knowledge:** Indirectly, PromoMats also helps sales enablement. Because all content is in one place and well-tagged, trainers or managers can easily find what content was shown to which HCPs and coach reps accordingly. Reps themselves, if they have Vault access, could search the content library to learn about all materials available for their product, ensuring they utilize the full array of resources. In some setups, reps might have access to an internal content portal (sourced by PromoMats) to explore items outside of CRM – for instance, to read the full prescribing information document or a whitepaper that they wouldn't necessarily show the doctor but need to understand.

For sales reps, the benefit of PromoMats is essentially **having the right content at the right time** and the assurance that it's all **compliantly vetted content**.

This allows them to engage customers with confidence, knowing that marketing and compliance teams have their back through the tools they're using.

How Medical Science Liaisons (MSLs) Leverage PromoMats

Medical Science Liaisons, who are field medical professionals, also benefit from PromoMats, even though their focus is on scientific exchange rather than product promotion. MSLs often operate in the medical affairs side of the organization, but when it comes to content, there is overlap with commercial content needs:

- **Access to Scientific Content:** MSLs frequently share scientific materials with HCPs – such as slide decks for discussions on clinical data, medical information letters, or published articles. While much of pure medical content might reside in systems like Vault MedComms, any **promotional or externally approved content** that MSLs are allowed to use (for example, a disease education brochure or a mechanism-of-action video that is non-promotional educational) would be managed through PromoMats. MSLs can access these materials via the same CRM integration. So if an MSL is meeting a Key Opinion Leader and wants to show an MOA animation that the marketing team created, they can retrieve it knowing it's the latest version and has been approved for use. This helps **align medical and commercial messaging** – both the sales rep and the MSL might use the same core piece of content in different contexts, ensuring consistency.
- **Ensuring Accuracy and Compliance in Medical Discussions:** MSLs have to be careful to stay within compliance guardrails, even though they discuss off-label or in-depth science topics (which reps cannot). If an MSL wants to share a slide from an upcoming congress or a piece of data, having it in PromoMats means it went through at least a compliance check to ensure it's accurate and appropriate to share. PromoMats' claims and reference linking features are valuable here – the MSL can be confident that the claims on a slide are all referenced. Should the HCP ask for a source, the MSL can often

provide the linked reference which may also be stored in the system. In this way, **PromoMats supports MSLs by providing pre-approved, scientifically accurate content** to facilitate their conversations.

- **Rep–MSL Coordination:** In some organizations, an MSL and a sales rep might collaborate on an HCP engagement (for instance, the rep brings the MSL to discuss detailed scientific questions). Using PromoMats as the common content source ensures that the **commercial and medical teams are in sync**. The rep might share a promotional slide and the MSL might follow with a deeper dive slide from a scientific presentation – both can be housed in the platform, maintaining one thread of content truth. If content gets updated (say new clinical trial results are approved for use), both reps and MSLs get that update simultaneously in their respective tools.
- **Handling Inquiries and Follow-ups:** Often an MSL will need to follow up on a specific question (medical inquiry) by sending detailed information. While formal medical inquiry handling might be via MedComms systems, if the follow-up involves sending an approved PDF or document, using PromoMats/CRM to send it ensures it's tracked and the content is controlled. For example, after a discussion, an MSL might send an HCP an **approved slide deck or a clinical reprint** stored in PromoMats via an Approved Email or share link. This would not only get the info to the HCP but also log that the content was sent, creating a compliance record.
- **Staying Current:** MSLs must stay on top of the latest data for their product. PromoMats can serve as a repository of all **current key content** – not just promotional pieces, but sometimes it may include things like FAQs or scientific narratives which MSLs reference. By using the system, an MSL can ensure they are using the latest approved statements or data points when crafting their talking points, because they can refer to the same claims repository that commercial uses. If a claim gets updated in PromoMats, both marketing and medical know at the same time.
- **Boundary Control:** It's worth noting that MSLs have access to some content that sales reps do not (especially off-label information). Companies can configure separate vaults or sections for that. But by having PromoMats for anything that is **approved for external use**, the organization ensures

that if an MSL is using a piece of content in the field (like a slide deck that was created for a scientific exchange), it underwent a proper review similar to promotional content. This helps avoid any missteps where an MSL might share something that wasn't vetted. Essentially, PromoMats (in conjunction with MedComms when applicable) forms part of the **medical information supply chain** for field medical teams, focusing on the approved, final outputs that can be shared.

For MSLs, the value of PromoMats is in providing a **trusted library of approved content** that they can draw from to support their scientific discussions. It allows them to engage in scientific dialogue with confidence that the materials they use are accurate, up-to-date, and compliant with what the company is allowed to share, thereby protecting both the MSL and the organization's credibility.

Benefits for Commercial and Medical Teams

By implementing Veeva PromoMats, organizations unlock numerous benefits that span both their **commercial teams (marketing and sales)** and their **medical affairs teams**. Here's an overview of the key advantages experienced by these teams:

- **Improved Compliance and Risk Mitigation:** First and foremost, PromoMats dramatically reduces the risk of regulatory non-compliance. Commercial teams benefit from built-in checks (only approved content goes out, everything is logged) so they can carry out campaigns with peace of mind. Medical teams also benefit since any materials they use from PromoMats have been through proper review. The platform's **audit trails, e-signatures, and enforced workflows** mean that if compliance questions ever arise, the company can defend its processes with clear evidence (PromoMats Overview | Vault Help). This protects the organization from

potential fines, warning letters, or reputational damage that could result from using unapproved or inappropriate content.

- **Faster Time-to-Market with Content:** Both marketing and medical communications functions see speed gains. Content that used to take weeks or months to approve can often be turned around much faster with a streamlined, transparent MLR process. The ability to collaborate in real-time, use modular content, and avoid starting from scratch for each piece means **content velocity increases**. For commercial teams, this agility can translate to being more responsive to market opportunities and competitor actions. For medical teams, it means quickly updating scientific content as soon as new data is available, thus keeping HCP communications current. Veeva has observed over a 50% average increase in content speed-to-market for customers leveraging these capabilities (Veeva PromoMats | Compliant Promotional Content Management | Veeva).
- **Efficiency and Cost Savings:** PromoMats drives efficiency by eliminating many manual tasks (chasing email approvals, uploading files to multiple systems, duplicating content creation). Marketing operations can handle more content with the same resources. Sales reps spend less time managing materials and more time with customers. MLR reviewers handle less redundancy (thanks to reusing modules/claims) so their workload lightens. All this can lead to **cost savings**, such as lower agency spend (due to content reuse) and less overhead for compliance admin. Some companies have reported a reduction in content creation costs by about 20% after optimizing with PromoMats (Veeva PromoMats | Compliant Promotional Content Management | Veeva), as well as rapid ROI (even within 6 months of implementation, per Veeva's customer data (Link)).
- **Better Cross-Team Alignment:** PromoMats serves as a single platform that bridges marketing, sales, medical, legal, and regulatory. This **breaks down silos** between departments. Commercial and medical teams have visibility into each other's content (with proper permissions) which fosters alignment in messaging. For example, if medical has updated an FAQ document, the commercial team can see that and ensure promotional messages remain consistent with the latest info. And when marketing rolls out a new

campaign, medical is aware of the key claims and data being used. This alignment is crucial in pharma, where inconsistent information can create compliance risks or confuse customers. PromoMats essentially provides a **shared source of truth** that everyone works from, promoting unity in communications.

- **Content Quality and Impact:** With robust tools for reference management and review, the **quality of content improves**. Errors or inaccuracies are more likely to be caught in the system's structured review than via ad-hoc processes. Also, by analyzing what content works (through analytics), teams can refine their content strategy to produce materials that truly resonate with HCPs. Over time, both commercial and medical teams end up curating a library of highly effective content. Field teams (reps/MSLs) can then engage HCPs with content that is not only compliant, but also high-quality and relevant, increasing their credibility and the value of their interactions.
- **Global Scalability and Local Agility:** For large organizations, PromoMats offers the benefit of global scalability – you can roll it out across affiliates worldwide, establishing a common standard for content management. This is great for headquarters marketing who want to share assets globally and ensure compliance processes are followed in all regions. At the same time, it gives local teams the agility to adapt content for their market within the same system. They can quickly localize and get local approval using the country-specific workflow configurations (PromoMats Overview | Vault Help). Both commercial and medical teams around the world thus operate in a consistent, efficient manner, but with freedom to address local needs.
- **Audit Preparedness and Transparency:** In both commercial and medical domains, audits (internal or external) are a fact of life. PromoMats significantly eases audit preparation. Commercial teams can, for example, instantly pull up all materials used in a certain campaign along with their approval certificates. Medical teams can document exactly what information was provided to an HCP and when. The transparency provided by PromoMats means fewer last-minute scrambles to gather evidence – everything is organized and readily accessible. This not only saves time but

also increases the confidence of teams when facing compliance committees or regulators.

- **Enhanced Collaboration and Morale:** While harder to quantify, having a modern system like PromoMats can improve team morale and collaboration. Marketers and MSLs alike feel empowered by a tool that makes their jobs easier (instead of fighting with bureaucratic hurdles, they have a clear path to get things done). The reduction in friction between teams (since everyone can see the process and status) builds trust. Over time, this can lead to a more collaborative culture between commercial and medical, as well as between headquarters and affiliates, all rallying around shared content goals using the same platform.

In sum, **Veeva PromoMats brings significant operational, compliance, and strategic benefits** to life sciences companies. Commercial teams become more agile and effective in their promotional efforts, medical teams ensure scientific accuracy and consistency, and both are supported by a framework that puts compliance at the center without sacrificing efficiency. The result is a more streamlined end-to-end process for delivering information to healthcare professionals, ultimately supporting better HCP engagement and, by extension, better patient outcomes through informed medical decisions.

Conclusion

Veeva Vault PromoMats has established itself as an indispensable solution for life sciences organizations to manage promotional content in a complex regulatory landscape. By providing an integrated platform for **content creation, approval, distribution, and withdrawal**, it allows marketers, sales reps, and MSLs to operate in unison, each focusing on their expertise while trusting the system to handle compliance and logistics. The **technical capabilities** – from modular content and DAM, to audit trails and CRM integration – make it a powerful engine that drives efficient promotional content operations on a global scale.

For any pharmaceutical or biotech company, the challenges of ensuring that the right content reaches the right audience at the right time (and that nothing falls through the cracks) are non-trivial. PromoMats directly addresses these challenges, offering **speed without sacrificing compliance**. Marketers can launch campaigns faster, reps can engage HCPs with confidence, and MSLs can disseminate accurate medical information – all using content vetted and tracked in one system. Moreover, leadership gains visibility and insight into the entire content lifecycle, enabling data-driven decisions to continually optimize their strategy.

In an era where digital engagement and compliance demands are both increasing, Veeva PromoMats provides a **scalable, proven framework** for managing promotional materials "from concept to retirement." Its widespread adoption in the industry testifies to its effectiveness in solving real-world problems that commercial and medical teams face daily. By implementing PromoMats, life science companies equip themselves to not only meet today's compliance standards but also to adapt quickly to future channels, content types, and regulatory changes – making it a future-proof investment in their commercial and medical excellence.