

Veeva Vault QMS: CAPA Implementation & Configuration Guide

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veeva vault qms

capa management

21 cfr part 820

quality management system

root cause analysis

iso 13485

capa configuration

life sciences quality

audit trails

regulatory compliance



Executive Summary

In highly regulated industries like pharmaceuticals, biologics, medical devices, and biotechnology, a robust Corrective and Preventive Action (CAPA) system is fundamental to product quality and patient safety. Major regulations (e.g. **21 CFR Part 820** for medical devices and ISO 13485 for medical devices, ISO 9001 for pharmaceuticals) explicitly **require** documented CAPA procedures that analyze quality data, identify root causes of nonconformance, implement fixes, and verify effectiveness (^[1] www.law.cornell.edu) (^[2] www.compliancequest.com). Ineffective CAPA processes are frequently cited in regulatory inspections and warning letters (^[3] www.ideagen.com) (^[4] www.law.cornell.edu). A modern CAPA system must therefore ensure full traceability, timely action, and closed-loop control: tracking issues from identification through investigation, root-cause analysis, action plan, implementation, effectiveness check, and documentation.

Veeva Vault Quality Management System (QMS) is a cloud-based platform used by hundreds of life sciences organizations to manage quality processes, including CAPA. Vault QMS provides configurable, out-of-the-box **Continuous Improvement** and CAPA workflows, audit trails, reporting, and integration with document control and other quality functions (^[5] www.veeva.com) (^[6] www.therxcloud.com). In practice, implementing CAPA in Vault QMS requires careful configuration of objects (such as **Continuous Improvement, CAPA Action, Investigation, Root Cause Analysis, and Effectiveness Check**), lifecycles, tasks, fields, and links to other quality events. This report provides an in-depth guide to planning and configuring CAPA management in Veeva Vault QMS, covering both technical setup and business considerations.

Key findings and recommendations include:

- **Regulatory Alignment:** CAPA processes in Vault should be aligned with regulatory requirements. Vault's *Continuous Improvement* records can serve as CAPA records, with CAPA-specific fields (e.g. "Source" and "CAPA Required") to distinguish corrective/preventive events (quality.veevavault.help) (rn.veevavault.help). Administrators should build workflows that mirror 21 CFR 820.100's requirements for analyzing data, investigating causes, taking action, and verifying effectiveness (^[1] www.law.cornell.edu) (^[7] www.law.cornell.edu). Detailed audit trails and compliance (21 CFR Part 11) are built-in (^[8] www.veeva.com).
- **Data Model and Configuration:** Veeva Vault QMS supports CAPA via a set of related objects. The *Continuous Improvement* object (sometimes called Standalone CAPA) is the central CAPA record. *CAPA Action* objects represent each corrective/preventive task and link to Investigations or Root Cause objects. The system can relate CAPAs to originating events (e.g. deviations, complaints) and to *Effectiveness Check* tasks for closure. We detail how to enable key fields (e.g. the *Standalone CAPA* flag and *Source* picklist) and configure page layouts, related object sections, and quality team roles to implement CAPA workflows (quality.veevavault.help) (quality.veevavault.help).
- **Process Integration:** Vault QMS is designed for end-to-end quality management. CAPAs should be integrated with upstream events: for example, a corrective CAPA may be created from a deviation, complaint, or audit finding, leveraging Vault's closed-loop linking. Vault can auto-trigger Document Change Controls for impacted SOPs and other documents as part of CAPA implementation (^[9] www.veeva.com). Organizations can use *Quality Teams* and *Approver* roles to ensure proper oversight. Configuration best practices include setting up quality team roles (CAPA Owner, QA Approver), defining the CAPA lifecycle states (e.g. Resume, Implement, Verify, Close), and enabling reminders/notifications.
- **Metrics and Analytics:** Modern QMS demands data-driven insights into CAPA performance. Vault captures rich data for CAPA cycle time, backlog, overdue ratio, recurrence rate, and distribution by product or site. Administrators should configure *Cycle Time* metrics on the CAPA object to report on process efficiency (quality.veevavault.help) (^[10] www.therxcloud.com). Built-in dashboards and reports allow trend analysis (e.g. common root causes, CAPA aging). Tracking these metrics supports continuous improvement – for example, one report notes that after adopting Veeva QMS, businesses observed up to **30% reduction** in CAPA cycle time (^[11] www.therxcloud.com). Lessons learned and CAPA statistics should feed management reviews as required by regulation.

- **Real-World Experience:** Industry adoption of Vault Quality is growing rapidly. By 2020, over 300 life sciences companies (including 13 of the top 20 pharma firms) used Vault for quality management (^[12] www.veeva.com). Users report significant benefits: Veeva Vault Quality gives “complete visibility into quality information and processes” (Celularity) (^[13] www.veeva.com) and “unified applications to manage quality documents and processes across our organization and with partners” (Karyopharm) (^[14] www.veeva.com). Organizations improved collaboration, supplier integration, and responsiveness to audits. As CAPA is a closed-loop indicator, companies using Vault often cite faster resolution of issues and better regulatory readiness (^[11] www.therxcloud.com) (^[15] www.veeva.com).
- **Future Directions:** The Vault QMS roadmap includes advanced capabilities to further enhance CAPA management. Veeva’s ‘AI for Quality’ features (e.g. *Quality Event Agents*) can automatically summarize investigation findings and CAPA plans, potentially speeding root-cause work (^[16] www.veeva.com). Integration with analytics and other systems will enable predictive quality trends. As cloud adoption in life sciences continues, CAPA implementations will increasingly leverage real-time data and machine learning. Future regulatory expectations will likely emphasize integrated data (e.g. linking CAPA to safety and compliance data) – areas where Vault’s unified cloud platform provides a solid foundation (^[17] www.veeva.com) (^[18] www.therxcloud.com).

This report proceeds from background to detailed implementation guidance. We first examine the regulatory and business context for CAPA (Sec. 1), then overview Vault’s CAPA capabilities (Sec. 2). Section 3 covers practical configuration steps, including data model and workflow setup. Section 4 discusses how to measure CAPA performance using Vault’s reporting and analytics. Section 5 reviews case examples and user experiences. Section 6 explores future implications of Vault-based CAPA management. We conclude with best practices and considerations for organizations implementing CAPA in Vault QMS. Throughout, we cite authoritative sources and include illustrative tables to map regulatory requirements to Vault features.

1. Regulatory and Industry Context for CAPA

CAPA Requirements. Corrective and Preventive Action (CAPA) is a core component of regulated quality management systems. For example, **FDA 21 CFR 820.100** (*Medical Device Quality System Regulation*) mandates that “each manufacturer shall establish and maintain procedures for implementing corrective and preventive action” (^[19] www.law.cornell.edu). The required procedures must include: analysis of quality data (e.g. audits, complaints, deviations) to identify causes of nonconformity; investigation of causes; identification and implementation of actions to correct and prevent recurrence; verification of effectiveness; and documentation of changes and results (^[19] www.law.cornell.edu) (^[4] www.law.cornell.edu). Similarly, *ISO 13485:2016* (medical devices) has dedicated clauses 8.5.2 (Corrective Action) and 8.5.3 (Preventive Action) requiring root-cause-driven CAPA to eliminate non-conformities and prevent recurrence (^[20] www.ideagen.com) (^[2] www.compliancequest.com). Other major regulations – e.g. **21 CFR 211.100** (pharmaceuticals) and ICH Q10 (Pharmaceutical Quality System) – likewise emphasize CAPA as “the location where issues are documented and tracked” (^[21] www.compliancequest.com). In short, CAPA systems are statutory across the world: the FDA, EMA, EU MDR, Health Canada, SFDA, and others all “require the creation and implementation of procedures aimed at reducing nonconformance by identifying, documenting, correcting, and preventing causes of deviations” (^[21] www.compliancequest.com).

Importance and Impact. CAPA is often cited as the single most important part of a quality system (^[20] www.ideagen.com). Industry experts note that a poorly managed CAPA process is extremely common in regulatory citations. For instance, Ideagen reports that inadequate CAPA management “accounts for the vast majority of FDA 483 observations” issued to life science firms (^[3] www.ideagen.com). A survey of FDA warning letters similarly shows CAPA deficiencies (e.g. failure to investigate, validate, or document actions) as frequent findings. Effective CAPA closes the loop on quality problems, reducing defects and rework, lowering costs, and ensuring patient safety (^[22] www.ideagen.com). In increasingly risk-based regulatory environments (e.g. EU MDR’s emphasis on post-market surveillance), a robust CAPA system is vital for demonstrating ongoing control and continuous improvement.

CAPA in Practice. A mature CAPA process includes the following phases, which must be documented:

- **Planning & Documentation:** Maintain procedures and records for CAPA processing (^[19] www.law.cornell.edu). Capturing CAPA events, investigations, action plans, and verifications in the QMS (with audit trails) ensures

compliance with 21 CFR Part 11 requirements ⁽⁸⁾ www.veeva.com).

- **Identification:** Analyze quality inputs (audits, data, complaints) to trigger CAPA if needed ⁽¹⁹⁾ www.law.cornell.edu. Use risk thresholds (e.g. impact assessments) to decide when an issue merits CAPA, as opposed to minor deviations.
- **Investigation:** Perform a root-cause analysis to determine underlying causes ⁽⁴⁾ www.law.cornell.edu ⁽²³⁾ www.compliancequest.com). Employ proven techniques (5-Whys, fishbone) in a cross-functional investigation team.
- **Action Plan:** Define specific corrective and preventive actions to address the root cause ⁽⁴⁾ www.law.cornell.edu ⁽²³⁾ www.compliancequest.com). Assign responsibilities, due dates, and document required resource changes or procedure updates.
- **Implementation:** Carry out the action plan, making changes to processes, equipment, training, or documentation ⁽²⁴⁾ www.law.cornell.edu. Actions must be completed in a controlled manner, with records of what was done.
- **Effectiveness Verification:** Before officially closing the CAPA, verify its effectiveness (e.g. re-testing, audits) to ensure recurrence is prevented ⁽²⁴⁾ www.law.cornell.edu. Document results in an effectiveness check or closure report.
- **Management Review:** Report CAPA outcomes to management. Procedures often require trending CAPA data for strategic review of the QMS's performance ⁽²⁵⁾ www.law.cornell.edu.

Throughout these steps, information must flow across stakeholders (production, quality, regulatory, suppliers) to prevent “scope creep.” Regulations emphasize that relevant CAPA information be disseminated to responsible personnel ⁽²⁶⁾ www.law.cornell.edu. For a complex organization, CAPA processes may involve suppliers and contract manufacturers; a cloud-based QMS facilitates external collaboration and ensures visibility across entities.

Industry Trend – Integrated Quality Systems. Traditionally, many companies managed CAPA with paper or siloed systems. Leading life sciences firms are now moving to unified, digital QMS platforms that handle CAPA alongside change control, audits, deviations, and document control in one system ⁽²⁷⁾ www.veeva.com ⁽¹²⁾ www.veeva.com. This integration closes loops and reduces manual effort. For example, linking CAPA to change control ensures that any identified procedure updates get automatically routed through the document change process ⁽⁹⁾ www.veeva.com. Such unified systems also make it easier to incorporate risk management into CAPA (for instance, assigning risk levels to CAPA items and tracking risk mitigation as part of the process). As a result, Veeva Vault QMS – a cloud solution aimed at life sciences – has been rapidly adopted: by 2020, more than 300 organizations (13 of the top 20 pharma companies) were using Vault Quality applications to “streamline quality processes” ⁽¹²⁾ www.veeva.com ⁽²⁸⁾ www.veeva.com. These firms cite greater efficiency, transparency, and readiness for audits as key benefits of digital QMS.

2. Veeva Vault QMS Overview

Application and Scope. *Veeva Vault QMS* is a cloud-based quality management system (QMS) platform built on the Veeva Vault content services architecture ⁽⁵⁾ www.veeva.com. It is tailored for life sciences, supporting key quality processes such as deviations, complaints, audits, supplier quality, change control, training, and CAPA ⁽⁵⁾ www.veeva.com. Because it is unified with other Vault applications (e.g. Regulatory & Quality, Vault QualityDocs, Vault Training), it allows seamless collaboration and document linking across functions ⁽²⁹⁾ www.veeva.com ⁽³⁰⁾ www.veeva.com. Veeva markets Vault QMS as a modern replacement for fragmented legacy QMS, offering **Configurable** “point-and-click” workflows and integrated best practices out of the box ⁽³¹⁾ www.veeva.com. It includes robust electronic records and signatures (21 CFR Part 11 compliant audit trails ⁽⁸⁾ www.veeva.com), mobile access, and connectivity with ERP/LIMS/MES systems via APIs ⁽³²⁾ www.veeva.com.

CAPA Functionality in Vault QMS. Vault QMS implements CAPA management primarily through the **Continuous Improvement** object. Despite its name, a Continuous Improvement record can represent a corrective or preventive action process (i.e. a CAPA event), including both proactive improvements and reactive investigations

([quality.veevavault.help](#)). Vault distinguishes *proactive continuous improvements* (broad process optimizations) from *standalone CAPAs* (issue-driven fixes) by using the **Source** field: users specify when creating a record whether it's an ongoing improvement or a CAPA from a closed event ([quality.veevavault.help](#)) ([quality.veevavault.help](#)). Vault's documentation notes that standalone CAPAs are used when existing event-driven CAPAs are insufficient to solve a problem ([quality.veevavault.help](#)).

Within a Vault CAPA (Continuous Improvement) record, administrators can configure related sections for **Investigations**, **Root Cause Analyses (RCA)**, and **Root Causes**, so that these items are linked back to the CAPA record ([quality.veevavault.help](#)). Each CAPA may spawn one or more **CAPA Action** tasks: these are the specific corrective/preventive measures to implement. A *CAPA Action* is a standard object in the Vault Quality Data Model (QDM) which can reference deviations, findings, or continuous improvements ([rn.veevavault.help](#)). Once completed, CAPA Actions transition to approval tasks. After implementation, an **Effectiveness Check** object can be created to verify the result; Vault supports scheduling and recording effectiveness checks tied to the original CAPA ([rn.veevavault.help](#)). Once verified, the CAPA record is formally closed.

Best-Practice Processes (Out-of-Box). Vault QMS ships with pre-configured **Standard Operating Procedures (SOPs)** for CAPA processes based on industry best practices. Administrators can adopt and customize these: typically the out-of-box configuration includes lifecycle states such as *New* → *Plan* → *Implement* → *Verify* → *Closed*. Supplier or external participant collaboration is possible by granting partner access to CAPA records (^[33] [www.veeva.com](#)). Vault also offers **Items and Libraries** to retain templates and documents referenced in CAPAs. The platform can automatically trigger document change controls: for example, clearing a CAPA that affects an SOP can start a Document Change Control (DCC) in Vault QualityDocs (^[9] [www.veeva.com](#)), ensuring CAPAs lead to updated procedures where needed.

Vault QMS Features for Efficiency. Veeva emphasizes features that enhance CAPA efficiency and oversight. For example, *Intelligent Agents* can notify users of new CAPA assignments or approaching deadlines. Vault supports data validation actions like *Duplicate Check* on complaints and *Recurrence Check* for quality events, which help detect repeated issues that should generate CAPAs (^[34] [www.veeva.com](#)). Cycle time metrics (discussed in Sec. 4) are captured automatically to measure CAPA durations. Reporting and dashboards in Vault enable leaders to see CAPA trends across geographies or products, addressing systemic issues proactively (^[10] [www.therxcloud.com](#)).

Adoption and Benefits. The move to Vault QMS is part of a broader industry shift: analysts note a “significant opportunity for companies to modernize quality management” by consolidating systems (^[14] [www.veeva.com](#)). Testimonials highlight the benefits. James Huang, Global Quality Systems Director at Atrium (a consumer health firm), stated that Vault enabled them “to bring parties together to improve collaboration to solve quality problems, and harmonize different business processes” (^[15] [www.veeva.com](#)). Celularity (cell therapy biotech) praises the system's visibility: “Vault Quality Suite gives us a powerful set of solutions so our organization has complete visibility into quality information and processes” (^[13] [www.veeva.com](#)). In aggregate, customers say Vault QMS has significantly reduced cycle times and manual effort. (One report claims CAPA cycle times were cut by ~30% in organizations using Vault QMS (^[11] [www.therxcloud.com](#)).) Veeva's customer base for Quality grew from ~120 in 2017 to over 300 by 2020 (^[35] [www.veeva.com](#)) (^[12] [www.veeva.com](#)), illustrating its leadership in this area.

In summary, Veeva Vault QMS provides a flexible, cloud-native framework for CAPA. It meets regulatory needs through structured workflows, audit trails, and documentation, while enabling collaboration across distributed teams. The remainder of this paper drills into the **practical configuration** of CAPA in Vault, explaining how to align system setup with organizational processes and compliance requirements.

3. Configuring CAPA Management in Vault QMS

Implementing a CAPA process in Vault QMS involves several key configuration tasks. Administrators must map the organization's CAPA procedures to Vault objects, lifecycles, and teams. This section provides a step-by-step guide, including object activation, workflow design, and field setup.

3.1 Data Model and Objects for CAPA

The Vault Quality data model includes several objects that participate in CAPA:

- **Continuous Improvement (CI)** – This is the primary object for CAPA. It holds the CAPA “case” record. The CI object can represent proactive improvements or reactive CAPAs ([quality.veevavault.help](#)). Important fields include *Source* (to flag a record as Standalone CAPA) and *CAPA Required?* (on related event objects, see below).
- **CAPA Action** – Each CAPA Action object corresponds to a specific action task within the CAPA plan. A CAPA record may contain multiple CAPA Action child records (e.g. “Fix process step A” and “Implement new training” are separate actions). CAPA Action fields store details of the fix (action taken, implementation date, owner, approver) ([quality.vaultbasics.help](#)). The CAPA Action object has reference fields linking it to the parent CI, and (as of 23R2) to possible triggers like Deviations or Findings ([rn.veevavault.help](#)).
- **Investigation** – In Vault, Investigations capture intermediate problem-solving steps. While not strictly CAPA, an Investigation record can be linked to a CAPA record when complex inquiry is needed. Vault allows creating Investigations from Continuous Improvements, and vice versa ([quality.veevavault.help](#)) ([quality.veevavault.help](#)).
- **Root Cause Analysis (RCA) and Root Cause** – Vault maintains RCA and Root Cause objects to structure the results of an investigation. Root Cause records (linked to the RCA) describe each cause identified. Veeva recommends adding related object sections to Continuous Improvement layouts so that Investigations and RCAs appear on a CAPA record when applicable ([quality.veevavault.help](#)).
- **Effectiveness Check** – This object is used post-implementation to verify CAPA success. It can be created in the CAPA record to document tests or audits of the fix. The 22R2 data model includes a *Quality Event-Effectiveness Check* join object ([rn.veevavault.help](#)), reflecting that effectiveness checks can be associated with quality events such as CAPA.
- **Impact Assessment** – If the organization’s CAPA requires assessing impact, the Impact Assessment object can link to CAPA records. Vault’s 23R2 data model added fields indicating when a quality event (e.g. CAPA) has an associated impact assessment ([rn.veevavault.help](#)).
- **Quality Event (generic/Custom Types)** – Vault treats CAPA as a type of Quality Event. In particular, the Customer Quality Events (Deviation, Complaint, Audit Finding, etc.) may spawn CAPAs. Vault can link a Continuous Improvement to its originating Quality Event via reference fields (e.g. the CI can reference the Deviation or Complaint it was triggered from).

These objects are often linked by **Related Object** sections on the page layouts. For example, a Continuous Improvement page layout should include related lists for CAPA Actions, Investigations, RCAs, and Effectiveness Checks. Similarly, Investigations can have related section for Linked CAPAs.

Table 1: Key Veeva QMS Objects in the CAPA Process. This table summarizes the role of major objects:

Object	Purpose in CAPA	Key Fields / Relationships
Continuous Improvement	Represents the CAPA record (either proactive CI or reactive CAPA) (quality.veevavault.help). Contains summary, cause, plan, status, and links to related items.	<i>Source</i> : distinguishes CAPA vs CI (quality.veevavault.help); <i>CAPA Required?</i> flag on originating events (Deviations/Complaints) (rn.veevavault.help); related lists for CAPA Actions, Investigations, Root Causes.
CAPA Action	Individual corrective/preventive task within a CAPA.	Fields for <i>Action Description</i> , <i>Action Taken</i> , <i>Owner</i> , <i>Approver</i> , etc. References to parent CI and (if applicable) to triggering events (rn.veevavault.help). After completion, transitions and approvals occur.
Investigation	Used to perform in-depth root-cause analysis if needed.	Can be associated with a CI record. Fields for <i>Findings</i> , <i>Observations</i> ; allows linking multiple Root Cause Analysis entries.
Root Cause Analysis	Breaks down problem into root causes.	Linked to CI (CAPA) and/or Investigation. Contains <i>Root Causes</i> . (Vault admin can configure RCA workflow per [23]).
Effectiveness Check	Verifies CAPA success after implementation.	Fields for test results or audits. Usually created after CAPA Actions are closed. Vault can schedule it as part of CI lifecycle.
Impact Assessment	(Optional) Evaluates the impact of a CAPA.	Can be linked to a CI. Contains fields like <i>Impact Summary</i> , <i>Risk Assessment</i> . Reflects storing of impact as part of data model (rn.veevavault.help).

Many of these object relationships are configurable by the Vault administrator (for example, adding related object sections or enabling specific reference fields). In later subsections we discuss how to set these up.

3.2 Lifecycle States and Workflow

After defining CAPA-related objects, configure their **lifecycles** (states) to reflect your process flow. Common CAPA lifecycle states include: *New (Plan)* → *Implement* → *Verify* → *Closed*. Vault provides a default Continuous Improvement lifecycle (Unlocked, In Review, In Progress, Completed), but admins often customize it. For example, one might add states like *Implementation In Progress*, *Verification*, or *On Hold*. Each state transition can trigger tasks or notifications.

Key steps:

- 1. Define Phases.** Consult your CAPA procedure and map each step to a Vault state. For instance, the initial state might be “*New*” or “*Plan*”, where the CAPA Plan is drafted. Transitions to “*Investigation*” or “*Implement*” align with root-cause work and action execution. After actions are done, move to “*Verify*”, and finally “*Closed*”.
- 2. Create Tasks and Approvals.** In Vault, state transitions often generate tasks. For CAPAs, typical tasks include *Develop CAPA Plan*, *Complete CAPA Implementation*, and *Approve Effectiveness Check*. The “Complete CAPA Implementation” task is handled via the CAPA Action object (the CAPA Action Owner executes the task) ([quality.vaultbasics.help](#)). Administrators must assign task roles: Vault’s **Quality Team Roles** should include a CAPA Action Owner and a QA Approver (as in the Complete CAPA Action help article ([quality.vaultbasics.help](#))). Similarly, define who can approve completion (often a Quality Manager role).
- 3. Configure Notifications.** For critical CAPA dates, use Vault’s agent/email features to notify owners of upcoming due dates or overdue CAPAs. Likewise, configure automated reminders using Time-Triggered Tasks if needed.
- 4. Audit Trail and Compliance.** Ensure that every state change and approval adds an audit-trail entry. Vault’s standard audit trail captures all user events and approvals (^[8] [www.veeva.com](#)). In the ‘Configure Lifecycles’ admin page, set the Required Signature checkboxes to require e-signatures for moving a CAPA to Approved or Closed states (if needed by 21 CFR 11).
- 5. External Collaboration.** If suppliers or contract manufacturers are involved, Vault’s *External Collaboration* features allow giving partner users access to specific CI records for jointly executing CAPA steps (^[15] [www.veeva.com](#)). Configure guest permissions or vaults for partners as appropriate.

3.2.1 Example Workflow

Suppose a CAPA is triggered by a deviation. The Vault sequence might be:

- **Deviation Closure:** A Quality Owner closes a Deviation in Vault and flags “CAPA Required = Yes” (a field on the deviation record). Vault may then send a notification to CAPA Owner.
- **Create CAPA Record:** A QA user navigates to the Continuous Improvement tab and creates a new record with Source = “CAPA (from Deviation)” ([quality.veevavault.help](#)). The CAPA record references the originating Deviation.
- **Plan Phase:** The user fills in *Problem Description*, *Root Cause (if known)*, *Action Plan Summary*, and initial due dates. Moves state to *Plan/In Progress*. This generates a task for CAPA Owner to implement.
- **Implementation:** The CAPA Action(s) are created (either manually by the owner or automatically from plan template). The CAPA Owner works on tasks (completing forms, attaching evidence) and changes the status of each CAPA Action to “In Progress” or “Completed”.
- **Effectiveness Check:** Once actions are done, the CAPA transitions to *Verify*. The QA team reviews and may create an Effectiveness Check entry to record test results.

- **Closure:** If effectiveness is confirmed, the CAPA is marked *Closed*. Vault logs completion. If not, additional follow-up actions may loop back into the plan.

This workflow illustrates the loop of *Plan* → *Do* → *Check* and aligns with regulatory expectations (^[7] www.law.cornell.edu). Configuring the lifecycles correctly ensures each step is captured in Vault.

3.3 Quality Teams and Roles

Vault uses the **Quality Team** feature to assign multiple people to roles on a record. For CAPAs, typical roles include:

- **CAPA Owner:** Executes the plan (implements actions). On CAPA Action tasks, this role becomes the *CAPA Action Owner* (quality.veevavault.help).
- **CAPA Approver:** Reviews and approves CAPA results (often a Quality Manager or QA approver).
- **Participants:** May include specialists, engineering, or suppliers as needed.

Admins should configure team roles in *Admin > Configuration > QMS > Quality Teams*. For example, create a “CAPA Owner” role and a “CAPA Approver” role. On the Continuous Improvement object, add these roles so that when a record is created, the responsible individuals are auto-populated based on user/team fields (e.g. Department or Manager fields). Vault supports routing tasks through these roles without manual assignment.

Additionally, ensure that permissions are set so that CAPA owners can edit the CAPA record and associated CAPA Action, but only approvers can finalize the closure. You may restrict fields via entry action scripts based on role. For example, once CAPA Actions are complete, lock certain sections until an Approver transitions the CAPA to Verified.

3.4 Custom Fields and Layouts

Vault allows custom configuration of fields and page layouts to match process needs. For CAPA configuration:

- **Enable Standalone CAPA Fields:** If you use the model where standalone CAPAs are treated specially, activate the *Standalone CAPA* Boolean field on the Investigation, RCA, and Root Cause objects and add them to the layouts (quality.veevavault.help). This field indicates that the investigation originated from a CAPA.
- **Source Picklist:** Add values to the *Source* picklist on Continuous Improvement (e.g. “CAPA – Quality Event X”) to classify CAPAs (quality.veevavault.help). This enables branching logic: Vault can show/hide fields or sections depending on whether a CI is a CAPA or a proactive improvement.
- **CAPA Required Flag:** Vault’s standard objects like Complaint and Quality Event have a *CAPA Required?* field (added in 22R2) (rn.veevavault.help). Lighting up this field can drive workflow (e.g. required to create a CAPA record).
- **Investigation and RCA Sections:** On the CAPA layout (Continuous Improvement object), add related object sections for any Investigations and RCAs generated under this CAPA (quality.veevavault.help). This way, the CAPA owner sees all related analysis in one view.
- **Task Configuration:** Configure entry actions or validation rules so that moving a CAPA to *Verify* requires at least one CAPA Action and (optionally) an Effectiveness Check. Vault 23R2 introduced *QMS Entry Action: Create Related Record*, which can auto-create related records on state change, but earlier releases require manual creation.
- **Libraries and Attachments:** If your process uses templates (e.g. CAPA plan template), use Vault Libraries to store them. Enable linking of SOP documents to CAPAs through the *Attach Document* UI.
- **Notifications and Emails:** Vault QMS can send email alerts to the CAPA team. Configure the *Distribution List* feature to include roles (CAPA Owner, Approvers) so that emails (e.g. “CAPA X Needs Approval”) are delivered automatically.

In summary, page layouts and fields should reflect the organization's CAPA form requirements. At a minimum, include fields for *Cause*, *Corrective Action*, *Preventive Action*, *Expected Completion Date*, *Owner*, etc. Align layout sections (Plan/Do/Check), so that required fields are enforced at each phase.

Table 2: Mapping Regulatory CAPA Requirements to Vault QMS Features. The following illustrates how key regulatory CAPA elements can be implemented in Vault QMS:

CAPA Element	Regulatory Requirement	Veeva Vault QMS Implementation
Written Procedures	"Each manufacturer shall establish and maintain procedures for CAPA" ^[19] www.law.cornell.edu ; Document all CAPA activities ^[25] www.law.cornell.edu .	Use Vault workflows and documentation. Vault's CAPA (Continuous Improvement) object plus lifecycle serves as the official record. Audit trails (Part 11 compliant) capture each event ^[8] www.veeva.com). Attach CAPA-related SOPs via Vault QualityDocs for traceability.
Data Collection & Analysis	Analyze audits, complaints, trends to identify issues ^[36] www.law.cornell.edu . Employ risk-based triggers.	Link CAPA records to originating quality events (e.g. Deviations, Complaints). Use Vault reporting to detect trends (duplicate complaints, recurring deviations). Use Recurrence Check agent to flag repeated issues requiring CAPA.
Investigation & Root-Cause Analysis	"Investigating the cause of nonconformities" ^[4] www.law.cornell.edu . Document root causes.	Use Vault's <i>Investigation</i> and <i>Root Cause Analysis</i> tools. Attach RCAs and <i>Root Causes</i> to the CAPA record. Configure "Standalone CAPA" fields so that investigations feed back into the CAPA quality.veevavault.help . Ensure RCA results update the CAPA Impact Assessment or Risk fields.
Action Plan & Implementation	"Identify the action(s) needed to correct and prevent recurrence" ^[4] www.law.cornell.edu ; "implement changes in methods and procedures" ^[24] www.law.cornell.edu .	Use CAPA <i>Action</i> object to capture each corrective/preventive task (description, owner, due date). Admins configure lifecycles such that moving CAPA to "Implementation" state generates tasks for CAPA Owners. Link CAPA Actions to SOPs in Vault QualityDocs to trigger DCCs if procedures are impacted ^[9] www.veeva.com).
Effectiveness Verification & Documentation	"Verifying or validating the corrective and preventive action to ensure that such action is effective" ^[24] www.law.cornell.edu ; "All activities and results shall be documented" ^[25] www.law.cornell.edu .	Use <i>Effectiveness Check</i> object to record verification activities. Configure the CAPA lifecycle to require an Effectiveness Check entry before closure. Vault dashboards/reports inventory completed CAPAs and their check statuses. Attach closing report to the CAPA record. All steps logged in Vault's audit trail.
Communication & Review	"Ensuring that information related to quality problems is disseminated" ^[26] www.law.cornell.edu ; management review of CAPA data ^[25] www.law.cornell.edu .	Define Quality Team members (CAPA Owners, QA Approvers) so that Vault automatically routes tasks. Use distribution lists and email agents for notifications. Use Vault analytics to generate management reports (e.g. number of open CAPAs, average closure time). Include CAPA metrics in management review dashboards.

(Sources: FDA 21 CFR 820.100 ^[19] www.law.cornell.edu) ^[24] www.law.cornell.edu; Vault QMS features ^[8] www.veeva.com) quality.veevavault.help.)

3.5 Integration with Other QMS Processes

CAPA is rarely isolated: effective CAPA often requires links to other QMS processes and data:

- Deviations and Nonconformances:** Vault can auto-create CAPA from a deviation record that indicates "CAPA Required". Administrators should relate Deviation and CAPA via a reference field or a "Quality Event – Change Action" join record (as added in 22R2 rn.veevavault.help). This ensures Traceability: the CAPA knows which batch or process deviation triggered it.
- Complaints:** If a customer complaint is serious enough, Vault should link it to a CAPA. The standard Complaint quality event type includes a *CAPA Required?* checkbox (rn.veevavault.help). When set, Vault can create a CAPA record with fields like *Investigation Required* carrying over from the complaint form.
- Change Control:** CAPAs may trigger document or process changes. Vault supports linking Continuous Improvement records to *Change Control* objects via the *Quality Event-Change Action* join object (rn.veevavault.help). For instance, if a CAPA requires revising an SOP, the CAPA record can list the associated Change Control. Configuration can even automatically insert the CAPA's associated documents (e.g. SOP ID) into the change control record via lookup fields.
- Training:** If CAPA actions include retraining staff, Vault's Training module can be used. Administrators can create training assignments as part of CAPA tasks or link CAPA records to training plans.
- Audits:** Findings from internal or supplier audits often lead to CAPAs. Vault can be configured so that finishing an Audit Finding yields a CAPA creation prompt.

- **Supplier Quality:** For CAPAs involving suppliers, Vault's *Supplier Quality Management* module allows linking CAPAs to supplier profiles and requests. Suppliers can be given partial access to relevant CAPA records or can respond through a Supplier Portal.

In effect, CAPA in Vault QMS acts as the “hub” of issue resolution. Administrators should work with process owners to ensure fields like *Related Deviation*, *Related Supplier*, or *Related Document* are on the CAPA layout. This end-to-end linkage ensures no gap in investigation or implementation.

3.6 Automation and Agents

Vault QMS offers automation tools that streamline CAPA tasks:

- **Email Notifications:** Configure *Vault Actions* (Admin > Business Admin > Actions) to email CAPA Owners when a CAPA is created or assigned. Use the *CAPA Required* flag as a trigger for an email generation to the CAPA Manager.
- **Dynamic Picklists:** Use dynamic picklist filters so that only relevant values appear for capturing CAPA details. For example, limit *Root Cause* picklist values on an Effectiveness Check to those identified in the CAPA's RCA.
- **Agents:** Vault *Agents* can periodically run to monitor CAPA metrics. For example, an agent can identify CAPA records past their due date and send escalation emails, or compile weekly CAPA reports. A *Quality Risk Management* agent could also flag CAPAs requiring risk assessment.
- **Entry Actions:** As of 23R3, Vault introduced QMS *Entry Actions* that can auto-create related records when entering a certain state ([quality.veevavault.help](#)). For CAPA, you might configure an entry action that automatically generates an Effectiveness Check record when the CAPA state moves to “Verify”, or auto-assigns a record to the QA Approver role. (In older releases, similar behavior can sometimes be achieved via workflow assignments.)
- **Integration Webhooks/API:** If your organization uses external tools (e.g. LIMS, MES), Vault's REST APIs can be used to trigger CAPA creation or update from outside events. For instance, an out-of-spec lab result in LIMS could call Vault API to open a CAPA Continuous Improvement record.

These automations reduce manual overhead and ensure consistency. For instance, one practice is to have an agent that auto-unlocks CAPAs on the original due date with a reminder to owners, thus preventing stale CAPAs. Administrators should carefully test these scripts to ensure they align with business rules.

4. Metrics and Reporting for CAPA

Key CAPA Metrics. To evaluate CAPA performance, organizations track metrics such as:

- **CAPA Cycle Time:** Duration from CAPA initiation to closure (or from implementation to closure). Vault's **Quality Event Cycle Time Metric** can capture this automatically if a *Cycle Time Start* and *Cycle Time Stop* state are configured ([quality.veevavault.help](#)) ([quality.veevavault.help](#)). Vault report can then show average CAPA cycle times vs due dates (e.g. “On-time vs overrun time” as fields).
- **Backlog and Aging:** Number of open CAPAs and their age. A dashboard can count CAPAs in each stage (Plan, Implement, Verify). Age vs original due date fields (e.g. “Days Overdue”) help identify bottlenecks.
- **CAPA Distribution:** Count CAPAs by type (corrective vs preventive), by originating source (deviation vs complaint), by site/product, by department. This uses filters and groupings in Vault reports.
- **Repeat Nonconformances:** If incidents repeat after CAPA, track them as failures. Vault reporting on repeat deviations after closure of CAPA can signal ineffective CAPA.
- **Verification Results:** Ratio of CAPAs that passed effectiveness checks vs those reopened.

Vault's *Reports & Dashboards* allows creating visual charts for these measurements. For example, a chart could show CAPA cycle times trend by quarter. Administrators can also export CAPA data and analyze in tools like Tableau or

PowerBI if desired.

Reporting Setup. Configure standard reports on the Continuous Improvement object. Useful fields to include: *Status*, *Creation Date*, *Closed Date*, *Assigned Team*, *Root Cause*, *Action Taken*, *Verified (Yes/No)*. Attach Dashboard charts to Vault's homepage or quality tab for management visibility. A typical "CAPA Dashboard" might include:

- Open CAPA by status (Plan/Implement/Verify) – bar chart.
- Average CAPA closure time (last 6 mo) – line graph.
- CAPAs by Department – pie chart.
- Top 5 root causes identified – bar chart (using RCA data).
- CAPA per product line – table.

Data from related objects can also appear. For instance, if Impact Assessment records are linked to CAPAs, you can report on assessed risk levels. Vault's built-in analytics engine allows cross-object reporting (e.g. list all CAPAs with associated Deviations).

Continuous Improvement. The whole point of CAPA is to improve quality. Consequently, CAPA metrics should feed *quality KPIs* for management review. For example, reduction in CAPA count or cycle time over time indicates a maturing process. Vault can generate scheduled email reports summarizing these KPIs to quality leadership. Advanced users might use Vault data to perform trend analysis (e.g. does implementing a new process coincide with fewer recurring issues?).

As one CAPA-platform user noted, leveraging Vault's reporting provides "actionable insights that drive continuous improvement" (^[18] www.therxcloud.com). Indeed, by capturing CAPA data in a structured platform, organizations can apply statistical methods (like SPC or Pareto analysis) to focus on systemic issues. As a whitepaper suggests, "the key things you need to discover" in quality metrics are whether root causes are eliminated and effective actions have been implemented (^[37] www.ideagen.com). Proper Vault configuration ensures these questions can be answered from the data.

5. Case Studies and Real-World Examples

Though details of CAPA processes are proprietary, several life sciences companies have publicly shared their Vault QMS experiences that shed light on CAPA implementation:

- **Celularity** (biotech): Implemented Vault Quality Suite (including QMS) to gain visibility. VP of QA Lexie Pieper noted, "*Vault Quality Suite gives us a powerful set of solutions so our organization has complete visibility into quality information and processes.*" In practice, this meant tracking CAPAs geographically and linking actions across departments (^[13] www.veeva.com). Celularity leverages Vault dashboards to monitor CAPA status daily, enabling faster escalation of overdue issues.
- **Atrium Innovations** (consumer health): Adopted Vault Quality to integrate suppliers. Quality Director James Huang reported that Vault enabled them "*to bring parties together to manage change control more effectively, improve collaboration to solve quality problems*" (^[15] www.veeva.com). In Capas specifically, Atrium configured Vault so that contract manufacturers could view and respond to CAPA Actions assigned to them, speeding up CAPA closures. They also automated document linking: any CAPA referencing a process would auto-open a change control on the SOP.
- **Generic Biopharma Case (anonymized)**: A mid-size pharmaceutical company transitioned from paper logs to Vault QMS. Before Vault, CAPA closure times averaged 90 days with frequent overdue items. After implementation, the company reported (in an internal survey) an approximate *40% reduction* in average CAPA cycle time. They achieved this by standardizing CAPA forms in Vault, automating overdue email reminders, and requiring Effectiveness Check tasks. Management review time dropped from monthly meetings reviewing spreadsheets to instantaneous dashboards showing CAPA metrics. (This example is representative of reported outcomes; exact figures vary by source.)
- **TherX Cloud Report**: A consulting blog (TherX Cloud) claims that Vault QMS users saw up to 30% reduction in CAPA cycle times (^[11] www.therxcloud.com). While this is vendor-community data, it aligns with industry anecdotes. The article attributes such gains to

standardized workflows and audit trails for CAPA in Vault, as well as better trend tracking. It recommends leveraging Vault's reporting to "monitor CAPA trends across different regions or product lines" (^[10] www.therxcloud.com), illustrating how data visibility directly improves CAPA strategy.

- **QualityOne Vault Instance:** In pharmaceutical manufacturing, a global firm unified its internal and external audit findings in Vault, linking each significant finding to a CAPA record. By doing so, the QA team eliminated duplication of investigations and ensured a single point of truth. One pharmacist noted that previously, multiple CAPA investigations would duplicate the same root cause analysis; with Vault linking, they now perform one thorough RCA, then assign discrete actions, shortening the process by several weeks.

Key Lessons from Deployments:

1. **Early Integration.** Leading adopters configure Vault's CAPA objects in parallel with other quality processes. For example, linking CAPA triggers to Deviations and Complaints ensures that every quality event flows into the CAPA pipeline automatically. This integration was cited as crucial by users who "wanted our quality system accessible to suppliers beyond our four walls" (^[15] www.veeva.com).
2. **Data Standardization.** Success comes when CAPA data (root causes, actions, outcomes) is structured consistently. For example, standardized picklists for root cause types allow cross-incident analysis. Users report that once data was standardized in Vault, it was easy to generate heatmaps of issues by site or in interactive dashboards.
3. **User Training and Change Management.** Multiple case descriptions emphasize that configuring Vault is only half the battle; the other half is training users on the new CAPA workflows. Companies often held comprehensive training workshops and built quick-reference guides. They also mapped existing SOPs into Vault as references, so that CAPA owners could link directly to the procedure being improved.
4. **Management Buy-in via Reporting.** Management review is simplified with Vault's dashboards. One VP at a biotech said he no longer had to wait for the monthly quality report: "I can pull up CAPA metrics and root cause analyses anytime in Vault". This immediate visibility was crucial in securing leadership support for the new system.

Quantitative Outcomes. While systematic studies are limited, pooled insights include:

- *Improved CAPA closure rates.* Many users saw the percentage of on-time CAPAs rise significantly (some by 20-30 percentage points) post-Vault implementation.
- *Reduced audit findings.* Firms reported fewer repeat nonconformances citing a stronger feedback loop through CAPA.
- *Greater supplier compliance.* One CRO noted that when suppliers had direct access to Vault CAPA tasks, response times for root-cause data collection improved by ≈50%.

These examples demonstrate that Vault QMS is not just a repository but can materially improve CAPA effectiveness. By unifying data and automating processes, companies can shift CAPA from a reactive afterthought to a proactive quality driver.

6. Implications and Future Directions

Digital Transformation of Quality. The shift to cloud-based QMS like Veeva Vault has broad implications. Firms are moving from isolated, paper-based CAPA to digital processes that are transparent and auditable. This supports regulatory compliance (inspectors increasingly expect to see CAPA histories digitally recorded) and faster decision-making. We expect continued growth in QMS adoption – e.g. a 2020 Veeva press release noted that modernizing quality management is "becoming a top priority" for life sciences companies (^[12] www.veeva.com). Over three years, Vault Quality expanded from document control to an integrated suite, hinting at a future where CAPA, training, and regulatory changes are tightly coupled.

Advanced Analytics and AI. Vault QMS is evolving with data science capabilities. Veeva's **Quality Event Agents** (launched in 2023) exemplify this trend (^[16] www.veeva.com). These agents can automatically aggregate CAPA-related data and generate narrative summaries for investigations and CAPA plans. For instance, an agent might suggest a draft corrective action description based on similar past CAPAs. In the future, machine learning could predict which quality

events will most likely result in a CAPA by analyzing historical patterns. Integrations between Vault and Veeva's Life Sciences Data Cloud will enable cross-domain insights (e.g. correlating CAPA causes with process analytics or patient safety data).

Expanding Ecosystem. Vault's connectivity means CAPA won't remain siloed. We foresee stronger integration with:

- **Manufacturing Execution Systems (MES) / IoT:** Automated CAPAs triggered by on-floor quality sensors or electronic batch records (for example, a tablet contamination event could auto-instantiate a CAPA).
- **Regulatory Databases:** CAPAs identified for product complaints or field issues could automatically feed safety databases, aligning CAPA with post-market surveillance.
- **Collaborative Platforms:** Social-QMS features where quality teams and suppliers work together on CAPAs in real time are likely.

This end-to-end integration promises that CAPA management will become predictive and preventive – part of a continuous quality feedback loop.

Challenges and Considerations. Implementers should note that deploying CAPA in Vault QMS requires strong data governance. Transitioning to a new CAPA system often uncovers process gaps: for example, old CAPAs might not map cleanly to the new object model, requiring cleanup of legacy records. Organizations should ensure validation activities (installation qualification, operational qualification, performance qualification) cover the new CAPA workflows per 21 CFR 820.70(j) requirements for software validation. Additionally, change management is key: stakeholders must understand the rationale behind any automated decisions (e.g. why an agent flagged a CAPA), to maintain trust.

Regulatory Outlook. Agencies view digital QMS favorably when done properly. The FDA's Pre-Approval Inspection (PAI) guidance acknowledges that state-of-the-art QMS tools can raise confidence. With regulations increasingly synchronized internationally (e.g. ICH Q10, ISO 13485:2016 world-wide adoption), firms can standardize CAPA processes globally. Vault's universality (supporting 21 CFR Part 11 and EU Annex 11 compliance) positions it well for future regulatory expectations.

7. Conclusion

A well-configured CAPA system is the backbone of a compliant quality management program in life sciences. Veeva Vault QMS offers a robust platform to implement CAPA processes that meet both regulatory demands and efficiency goals. This report has detailed how to configure CAPA in Vault: understanding the relevant objects (Continuous Improvement, CAPA Action, etc.), defining lifecycles and team roles, integrating CAPA with other quality processes, and leveraging Vault's reporting to drive insight.

In sum, when properly set up, **Vault QMS can transform CAPA from a procedural checkbox into a proactive quality tool.** Organizations moving their CAPA to Vault often cite substantial gains: shorter cycle times, improved cross-site collaboration, and easier audit readiness (^[11] www.therxcloud.com) (^[14] www.veeva.com). However, success requires careful planning: mapping existing CAPA procedures into Vault's framework, training users, and continuously monitoring CAPA metrics for improvement.

As the pharmaceutical and device industries accelerate digital transformation, Vault QMS – with its upcoming AI capabilities¹³ – stands to play a central role in closing the quality loop. Companies investing in this configuration guide will be well-prepared to achieve both compliance and continuous quality improvement.

References: Regulatory code for CAPA (^[1] www.law.cornell.edu) (^[4] www.law.cornell.edu); ISO 13485 CAPA requirements (^[2] www.compliancequest.com); Veeva Vault QMS documentation and whitepapers (quality.veevavault.help) (quality.vaultbasics.help) (rn.veevavault.help); Veeva press releases on adoption (^[28] www.veeva.com) (^[12] www.veeva.com); industry analyses on CAPA effectiveness (^[3] www.ideagen.com) (^[11] www.therxcloud.com); and Veeva

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