

Vault CRM Key Account Management Solution Accelerator

A smarter way to plan, track, and lead key accounts

Drive smarter, more strategic account engagement with the Account Plan in Veeva Vault CRM- empowering Key Account Managers to seamlessly orchestrate complex healthcare relationships. By bringing account insights, cross-functional execution, and KPI tracking into one unified view, it enables teams to strengthen partnerships, align stakeholders, and consistently deliver measurable business impact



Account Profiling



Strategic Planning



KPI Driven Execution

Key challenges

- ⦿ **Fragmented Account Visibility** making system-level insight difficult
- ⦿ **Disconnected Planning and Execution** across CRM and tools.
- ⦿ **Inconsistent KPI tracking** that are not aligned with leadership expectations
- ⦿ **Limited Cross-Functional Alignment** with no shared account narrative
- ⦿ **Poor continuity across planning periods** with historical plans hard to leverage

Our solution

- ⦿ **Holistic Account View** consolidating site- and HCP-level activities into a system-level perspective
- ⦿ **Cross-Functional Activity Roll-Up** enabling alignment without administrative overheads.
- ⦿ **Integrated Performance Tracking** to track execution, outcomes, and KPIs in one system- linking activity to impact.
- ⦿ **Configurable Planning Framework** for goals, SWOT, strategies, objectives, and actions aligned to customer planning models.
- ⦿ **Continuity across planning periods** with built-in plan history and comparison views

Contact us today

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