

veeva

# Approved Email BEE Editor

## Template Quick Start Guide



# Table of Contents

- 1** Approved Email BEE Editor overview
- 2** BEE email template pilot program
- 3** Template overview & use case
- 4** Approved Email best practice considerations
- 5** Available resources & contacts



# Important Disclosures

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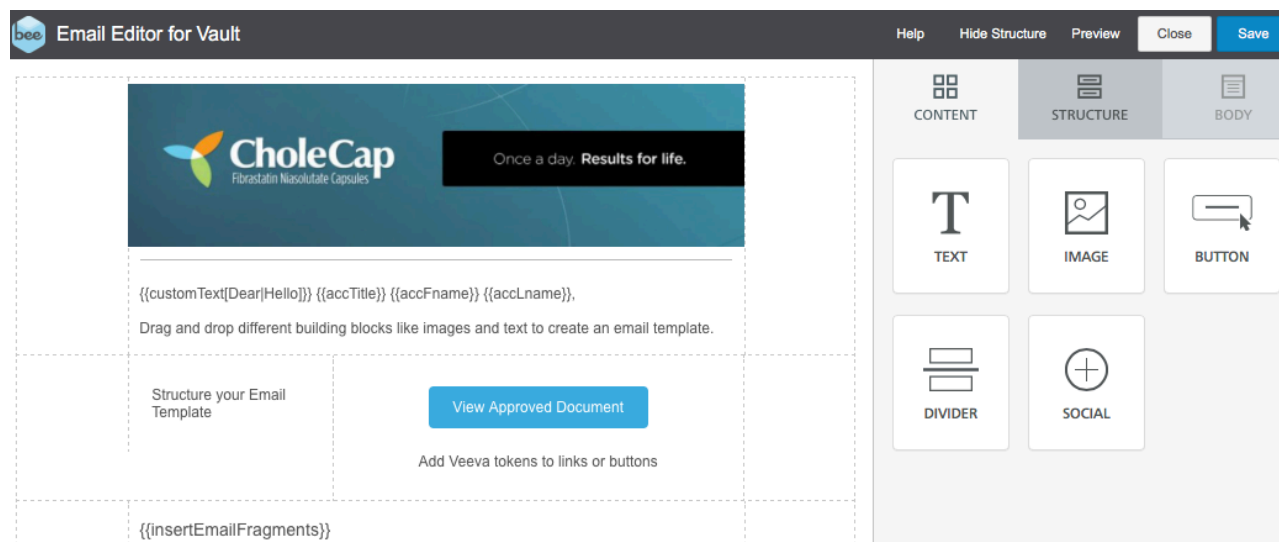




# Approved Email BEE Editor Overview

# What is the BEE Editor?

- An easy to use HTML email editor integrated to Vault
- Create responsive Approved Email templates in Veeva Vault
- No HTML knowledge is needed
  - Drag and drop text, images, dividers, buttons, colors and Approved Email tokens
- Benefits
  - Reduce the time spent on prototyping or building Approved Email templates
  - Real cost-savings with turn-key template solutions



# Learn More About the BEE Editor

Please see the following links for additional BEE Editor information or talk to your CSM for additional assistance.

- [Using the BEE Email Template Editor](#)
- [BEE Editor Support](#)





# BEE Email Templates

## Pilot Program



# BEE Editor Templates Overview



Turnkey BEE Editor templates created by Veeva agency partners  
available for starting Approved Email quickly and efficiently



AbelsonTaylor

AbelsonTaylor

Chicago, IL

[Veeva-support@abelsontaylor.com](mailto:Veeva-support@abelsontaylor.com)

312-894-5540



concentric

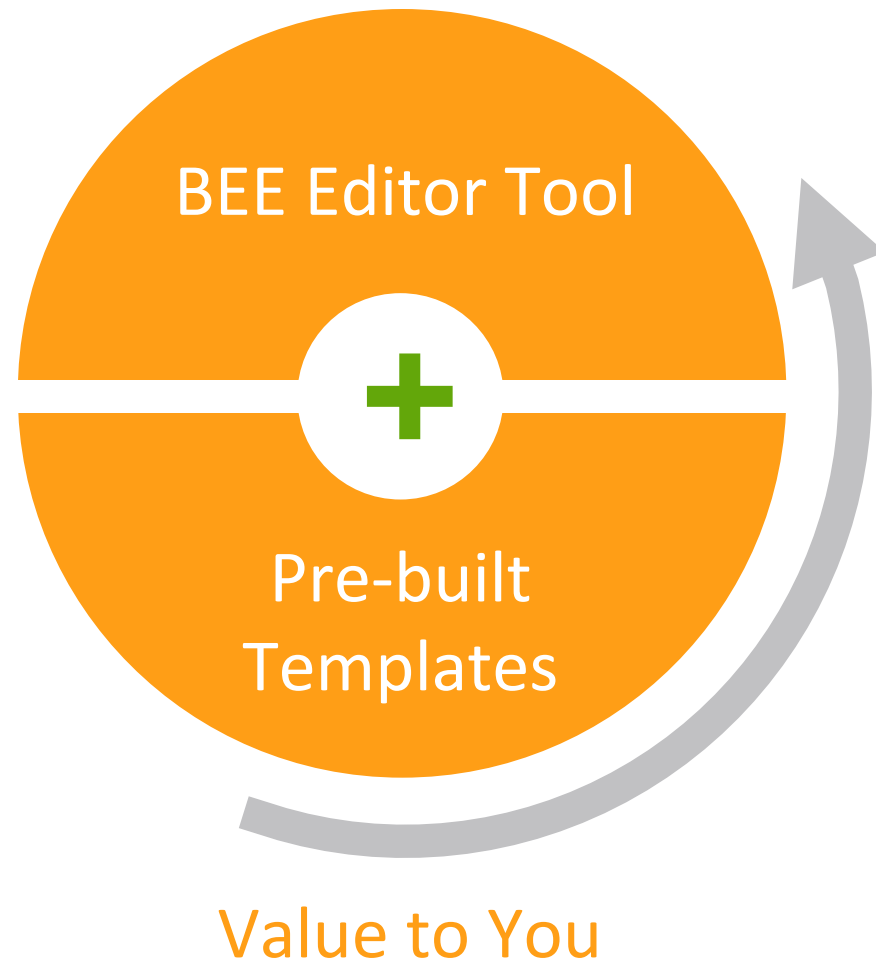
Concentric Health Experience

New York, NY

[clients@concentrichx.com](mailto:clients@concentrichx.com)

212-633-9700

# BEE Editor Templates Overview



Simplicity of the  
BEE editor

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Quality email  
content up and  
running in minutes

---

Variety of template  
topics and designs

# Templates Available

<b>General - Custom</b> Open-ended template Basic foundation	<b>Thanks for Stopping</b> Thank you follow-up for booth visitors
<b>Sorry I Missed You</b> Simple template for missed HCP connection	<b>HCP Meeting Confirmation</b> Confirm meeting date & time
<b>Survey Follow-Up</b> Basic template for sending survey or other link	<b>General Intro or Announcement</b> Alert HCPs to approved product or make intro
<b>Conference Invite</b> Basic email inviting HCP to customer's booth	<b>Post-Call Follow-Up</b> Basic template for post-call email plus send materials



# BEE Template Design Examples

600x120

Hello {{customText(100|Input Name)}},

For adults with ABC stabilized disease

**THANK YOU!**

We're glad you could join us for the 2018 American Academy of Science Congress in Chicago

300 x 250

We're glad you were able to stop by our booth during the [ show name ]. We hope you found our team friendly and the information engaging.

I would love to stop by to answer any questions that you may have about our offerings after your visit to the booth. But I'm always happy to jump on a call as well. Please reach out using my details below. Hope to connect soon!

{{customText(Sincerely|Regards|Best|Thank you|Talk to you soon)}},

{{userName}}  
{{User.MobilePhone}}  
{{userEmailAddress}}

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**Important Safety Information**  
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**Dosing Considerations**

Conference - thanks for stopping by

Important Safety Information Prescribing Information

600x120

Hello {{customText[Dr.|Mr.|Mrs.|Ms.|Miss]}} {{accLName}},

{{customText[I hope this message finds you well.|Looks like we were unable to connect.|I am sorry I missed you!]] With all of the options you have, we're excited that you've chosen to work with us. Until we have a chance to connect, please review the information at the link below. I think you'll agree that you made a great choice in electing to work with us.

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{{customText(Sincerely|Regards|Best|Thank you|Talk to you soon)}},

{{userName}}  
{{User.MobilePhone}}  
{{userEmailAddress}}

**Important Safety Information**  
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**Dosing Considerations**

Sorry I missed you

This is for your Preheader to help entice the user to open the email.

**Full Prescribing Information | Medication Guide**



This area is available for your INDICATION statement. Concentric Health Experience is indicated for clients who need a superior creative agency to help them effectively market to their customers.


Please see **Important Safety Information** below.

Dear Dr {{accLName}},

I hope you are doing well. I am reaching out on behalf of Concentric Health Experience, a promotional agency with a focus on health and wellness, with offices in New York City and London. I would love an opportunity to speak with you about the services we provide for clients such as yourself.

**NOW APPROVED**

This is an area that can be used for a description about the announcement of your newly approved therapy.



I will be in the area next week. Please let me know when it would be convenient to schedule a meeting. If you would like to speak more about my creative services, please contact me by email at [clients@concentrichx.com](mailto:clients@concentrichx.com), by phone at (212) 633-9700, or via the contact form available at [concentrichx.com/#client-contact](https://concentrichx.com/#client-contact).

I am looking forward to the opportunity to talk more.

**Concentric Health Experience**  
[clients@concentrichx.com](mailto:clients@concentrichx.com)  
(212) 633-9700  
[concentrichx.com/#client-contact](https://concentrichx.com/#client-contact)

General introduction or announcement



# Email Template Pilot Program

Get involved and be part of the pilot

## Who?

Actively recruiting customers interested in piloting the new BEE Editor template program

## What?

Pilot participants will provide us with valuable feedback for updating the content as necessary

## When?

Over the next two months (March-April)

## How?

Reach out to your Customer Success Manager to learn more

**We would also like to feature customer success that originates from the pilot program during our Customer Summit in May! Please let us know if interested in sharing your success story!**





# Template Overview & Use Cases

# Templates Available

Turnkey BEE Editor templates created by Veeva agency partners available for starting Approved Email quickly and efficiently

<b>General - Custom</b> Open-ended template Basic foundation	<b>Thanks for Stopping</b> Thank you follow-up for booth visitors
<b>Sorry I Missed You</b> Simple template for missed HCP connection	<b>HCP Meeting Confirmation</b> Confirm meeting date & time
<b>Survey Follow-Up</b> Basic template for sending survey or other link	<b>General Intro or Announcement</b> Alert HCPs to approved product or make intro
<b>Conference Invite</b> Basic email inviting HCP to customer's booth	<b>Post-Call Follow-Up</b> Basic template for post-call email plus send materials



Hello {{customText[Dr.|Mr.|Mrs.|Ms.|Miss]}} {{accLname}},

{{insertEmailFragments[1,3]}}

{{customText[Sincerely|Regards|Best|Thank you|Talk to you soon]}},

{{userName}}  
 {{User.MobilePhone}}  
 {{userEmailAddress}}

### Important Safety Information

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### Dosing Considerations

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### Medical Information & Adverse Events Reporting

To report a suspected adverse reaction from one of our products, please contact [Company Name] at [X-XXX-XXX-XXXX] or the FDA at 1-800-FDA-1088 or [www.fda.gov/medwatch](http://www.fda.gov/medwatch).

For more information, please see full [Prescribing Information](#)



AbelsonTaylor

Email template created by AbelsonTaylor. For additional strategic customizations, contact us at 312-894-5540 or by email at [veeva-support@abelsontaylor.com](mailto:veeva-support@abelsontaylor.com)

# Template: General

## Intended use case:

- General use – simple messaging

## Notes about this template:

- This template gives wide open freedom to create a simple, custom email
- Does not contain graphics
- Does have a token for fragments



600x120

Hello {{customText[Dr.|Mr.|Mrs.|Ms.|Miss]}} {{accLname}},

{{customText[|I hope this message finds you well.|Looks like we were unable to connect.|I am sorry I missed you!|]}} With all of the options you have, we're excited that you've chosen to work with us. Until we have a chance to connect, please review the information at the link below. I think you'll agree that you made a great choice in electing to work with us.

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Suspendisse eget nisi erat. Praesent in nunc turpis. Praesent ac malesuada lectus.

{{customText[Sincerely|Regards|Best|Thank you|Talk to you soon]}},

{{userName}}  
 {{User.MobilePhone}}  
 {{userEmailAddress}}

### Important Safety Information

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### Dosing Considerations

# Template: Sorry I Missed You

## Intended use case:

- Follow-up email to HCP after not being able to connect in-person

## Notes about this template:

- Graphics:
  - 600x120 pixel banner
- Contains configuration tokens for personalizing the message

600x150

Hello {{customText[Dr.|Mr.|Mrs.|Ms.|Miss]}} {{accLname}},

I appreciate your time the other day and want to thank you once again for agreeing to take part in our survey on {{customText(255|efficacy perception)}}. Please use the following link to access the confidential survey.

[ Take Our Survey ]

If you have any questions regarding the product - or the survey - please do not hesitate to contact me..

{{customText[Sincerely|Regards|Best|Thank you|Talk to you soon]}},

{{userName}}  
{{User.MobilePhone}}  
{{userEmailAddress}}

#### Important Safety Information

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Mauris sit amet massa vitae. Ut morbi tincidunt augue interdum velit euismod in pellentesque. Diam phasellus vestibulum lorem sed risus ultricies tristique nulla aliquet. Platea dictumst quisque sagittis purus sit amet volutpat consequat. Tristique senectus et netus et malesuada. Natoque penatibus et magnis dis parturient montes nascetur. Tortor posuere ac ut consequat. Mollis nunc sed id semper.

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Ut ornare lectus sit amet est placerat. Semper feugiat nibh sed pulvinar proin gravida hendrerit. Tincidunt praesent semper feugiat nibh sed. Pretium viverra suspendisse potenti nullam ac tortor. Donec pretium vulputate sapien nec sagittis. Elit sed vulputate mi sit amet. Tellus in metus vulputate eu scelerisque felis.

#### Dosing Considerations

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# Template: Survey Follow-Up

## Intended use case:

- Simple message containing a link to a survey (or other CTA)

## Notes about this template:

- Graphics:
  - 600x150 pixel banner
- Contains configuration tokens for personalizing the message
- Could also be used to direct HCPs to an important document, video or other media



300 x 250

For adults with ABC stabilized disease

## Proven Control

Join us for the 2018  
American Academy of  
Science Congress in  
Chicago Booth #123

Hello {{customText(33)}},

I'm a new Text block ready for your content.

{{customText[Sincerely|Regards|Best|Thank you|Talk to you soon]}},

{{userName}}  
{{User.MobilePhone}}  
{{userEmailAddress}}

### Lorem ipsum dolor sit amet

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Learn More

### Important Safety Information

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# Template: Conference Invite

## Intended use case:

- Invitation to visit your company at a booth in a conference

## Notes about this template:

- Graphics:
  - 300x250 pixel banner
- Contains configuration tokens for personalizing the message



600x120

Hello {{customText(100|Input Name)}},

For adults with ABC stabilized disease

## THANK YOU!

We're glad you could join us for the 2018 American Academy of Science Congress in Chicago

300 x 250

We're glad you were able to stop by our booth during the [ show name ]. We hope you found our team friendly and the information engaging.

I would love to stop by to answer any questions that you may have about our offerings after your visit to the booth. But I'm always happy to jump on a call as well. Please reach out using my details below. Hope to connect soon!

{{customText[Sincerely|Regards|Best|Thank you|Talk to you soon]}},

{{userName}}  
{{User.MobilePhone}}  
{{userEmailAddress}}

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

### Important Safety Information

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# Template: Conference; Thanks for Stopping By

## Intended use case:

- To thank an HCP for visiting a booth at a conference

## Notes about this template:

- Graphics:
  - 300x250 pixel banner
  - 600x120 pixel banner
- Contains configuration tokens for personalizing the message





Dear Dr {{accLname}},

Thank you very much for your time yesterday. It was nice speaking with you.

Below you will find confirmation and information for our next discussion. If you have any questions, please contact us by phone at **(212) 633-9700**, by email at [clients@concentrichx.com](mailto:clients@concentrichx.com), or via the contact form available at [concentrichx.com/#client-contact](https://concentrichx.com/#client-contact).

DATE

{{customText[Monday|Tuesday|Wednesday|Thursday|Friday|Saturday|Sunday]}}, {{customText[January|February|March|April|May|June|July|August|September|October|November|December]}}  
{{customText[1st|2nd|3rd|4th|5th|6th|7th|8th|9th|10th|11th|12th|13th|14th|15th|16th|17th|18th|19th|20th|21st|22nd|23rd|24th|25th|26th|27th|28th|29th|30th|31st]}}, {{customText[2019|2020|2021|2022|2023|2024|2025|2026|2027|2028]}}

TIME

{{customText[12:00am|12:30am|1:00am|1:30am|2:00am|2:30am|3:00am|3:30am|4:00am|4:30am|5:00am|5:30am|6:00am|6:30am|7:00am|7:30am|8:00am|8:30am|9:00am|9:30am|10:00am|10:30am|11:00am|11:30am|12:00pm|12:30pm|1:00pm|1:30pm|2:00pm|2:30pm|3:00pm|3:30pm|4:00pm|4:30pm|5:00pm|5:30pm|6:00pm|6:30pm|7:00pm|7:30pm|8:00pm|8:30pm|9:00pm|9:30pm|10:00pm|10:30pm|11:00pm|11:30pm]}} {{customText[Eastern Time|Central Time|Pacific

# Template: HCP Meeting Confirmation

## Intended use case:

- Meeting confirmation

## Notes about this template:

- This template contains configuration tokens allowing a rep to choose the date and time of their next meeting
- Graphics:
  - 600 pixels wide (can be any height)
- Greeting, “Dear Dr” can be swapped with a token or different wording





[Full Prescribing Information](#) | [Medication Guide](#)

This area is available for your INDICATION statement. Concentric Health Experience is indicated for clients who need a superior creative agency to help them effectively market to their customers.

Please see **Important Safety Information** below.

Dear Dr {{acclname}},

I hope you are doing well. I am reaching out on behalf of Concentric Health Experience, a promotional agency with a focus on health and wellness, with offices in New York City and London. I would love an opportunity to speak with you about the services we provide for clients such as yourself.

**NOW APPROVED**

This is an area that can be used for a description about the announcement of your newly approved therapy.



I will be in the area next week. Please let me know when it would be convenient to schedule a meeting. If you would like to speak more about my creative services, please contact me by email at **clients@concentrichx.com**, by phone at **(212) 633-9700**, or via the contact form available at **concentrichx.com/#client-contact**.

I am looking forward to the opportunity to talk more.

**Concentric Health Experience**

clients@concentrichx.com  
(212) 633-9700  
concentrichx.com/#client-contact

# Template: General Introduction or Announcement

## Intended use case:

- Announce approval or other general introduction to a rep

## Notes about this template:

- Graphics:
  - 600 pixels wide (can be any height)
- Contains some configuration tokens for personalizing the message
- Greeting, “Dear Dr” can be swapped with a token or different wording



This is for your Preheader to help entice the user to open the email.



Dear Dr {{accLname}},

Thank you for taking the time to speak with me about Concentric Health Experience. This email template is just one example of the types of services that we provide for our clients.

Below you will find links to the materials we spoke about.

If you have any follow-up questions, please feel free to contact us by phone at (212) 633-9700, by email at [clients@concentrichx.com](mailto:clients@concentrichx.com), or via the contact form available at [concentrichx.com/#client-contact](https://concentrichx.com/#client-contact).



Image is 600 pixels max width (.jpg or .gif)

#### Link/Download Headline

Use this section for linking to a single download or web page. Replace the headline with either the name of your downloadable item or the destination page. Replace this

## Template: Post Call Follow-Up

### Intended use case:

- Follow-up to HCP after a sales call, containing links to promotional or other materials

### Notes about this template:

- Graphics:
  - 600 pixels wide (can be any height)
- Contains configuration tokens for personalizing the message
- Greeting, “Dear Dr” can be swapped with a token or different wording





# Best Practice Considerations



# Before You Get Started

## Technical Considerations:

- Determine consent model (opt in/out)
- Where are emails coming from and where will replies go?
- Email Domain setup

## Training & Performance Considerations:

- Proper training is key – end-users should feel confident in using Approved Email (finding the correct template, etc.)
- Identify sales and marketing champions to help pioneer and lead excitement
- Executive sponsorship: Sales leadership should set expectations (but not quotas) with users on how often and when to send emails
- Scenario training: Important to train users on addressing various scenarios using different email templates
- Field feedback sessions: Gather feedback from users on content, usefulness, customer engagement and share feedback with brand teams to make adjustments



# Content Considerations & Best Practices

## Keep it Simple

- Emails that are less marketing-heavy perform best
- Don't pack emails, keep them focused
- Have clear, actionable links

## Personalize & Dynamic Content

- Utilize Veeva configuration tokens to personalize content easily, such as HCP name, greetings, etc.
- Keep content relevant and fresh
- Utilize a variety of templates for different types of email interactions
- Test when possible



# What are Possible Uses for Approved Email?

1

Confirming a meeting with an HCP

2

Follow up after a meeting or a no-show

3

Capture Opt ins and Opt outs

4

Announcing news about a product

5

Information gathering/surveys

6

Sharing content

7

Event invitations

8

Introducing self or colleague

9

Hard to see HCPs

10

Fulfilling a Medical Inquiry





Available Resources & Contacts

# Want to Customize these Templates Even More?

These resources can help

*Please Note: Advanced changes, customizations or content updates are not supported by Veeva. If you should need these services, please reach out to one of the agencies below or a Veeva Multichannel Partner. For a full list of the Approved Email configuration tokens click [here](#).*

## Agencies that created these templates:



AbelsonTaylor

Chicago, IL

[Veeva-support@abelsontaylor.com](mailto:Veeva-support@abelsontaylor.com)

312-894-5540



Concentric Health Experience

New York, NY

[clients@concentrichx.com](mailto:clients@concentrichx.com)

212-633-9700

## Veeva Multichannel Content Partners

Veeva's Multichannel Partners comprise a strategic network of companies, trained and supported to develop content through all Veeva's multichannel products.

Search our partner database here: <https://www.veeva.com/meet-veeva/partners/content/>

