Agency Content Guide

Advice and guidance on
making the very best Veeva content

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Otsuka

Veeva

Prepared by Ministry of Fish

CLM Content

Call Clickstream & Data Capture

VAEs

Designing for VAE Layouts

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Introduction

What this guide is

- This document is a practical reference for external partners creating CLM content or Veeva Approved Emails (VAEs) for Otsuka. It outlines the key things to consider at each stage: design, build, packaging and testing to allow materials to move smoothly into Veeva without delay.

- The aim isn't strict policing. It's to share the patterns, tips and technical expectations we've learned from working in Veeva every day - allowing your output to be successful from the start.

Who's it for?

Anyone involved in the production of:

- CLM slides or interactive content
- HTML email templates
- BEE-built emails
- Email fragments
- Assets or visuals intended for Veeva

Why we created this

We regularly collaborate with agencies who produce great creative work, but Veeva has specific requirements that aren't always obvious at the design stage.

Small missteps (like unsupported animations, unzipped image folders, or token placement issues) can slow down releases.

This guide helps avoid those pitfalls early by giving you the same foundation our internal digital team uses.

How to use this guide
Review the required sections depending on your part of the workflow. Each page has a focus, such as what Veeva expects, what typically works best and what to keep in mind when handling assets.

CLM Content

CLM content is designed for use by reps during conversations with HCPs that have tight time limitations. Slides need to load quickly, feel intuitive on iPad and support a smooth flow from one idea to the next. Veeva has its own behaviour and limitations, and so creative ideas should be shaped with these in mind from the start.

Safe Zones and On-Screen Overlays

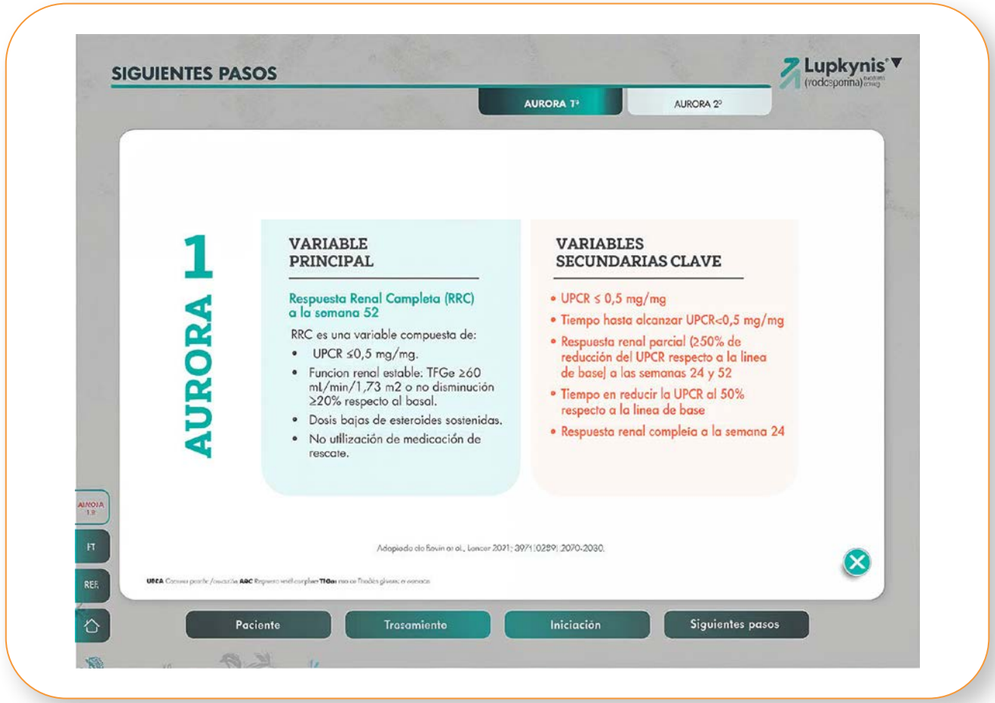
Veeva adds its own UI elements during a presentation such as menus, navigation bars and reaction buttons.

These elements sit on top of your design, and so it's vital that your content stays within a safe zone to remain consistently visible and avoid overlap.

When planning layouts, keep text, CTAs and interactive elements away from edges and corners. We provide a **safe zone template** to make this simple.

Layout and Navigation

- CLM layout should support a natural flow for the rep while keeping the content structured in a way that makes sense clinically. Simple forward and backward movement work best, with **clear chapter sections** for longer decks



- Pop ups and overlays can be helpful for short supporting content but using too many can harm both usability and approval timelines. They also affect how easily marketing teams can perform claims harvesting. If important claims are hidden behind multiple layers or small pop ups, it becomes harder for teams to catalogue them and reference them during certification

- For this reason, avoid designs that rely heavily on nested overlays or deep interaction layers. Give key claims and messages their own clear space. If a concept is clinically important or forms part of the claims set, it is usually better as its own slide rather than buried in a pop up

- A good approach is to reserve pop ups for simple definitions, references or reminders, while keeping core messaging in the main flow. This keeps the deck easy for reps to navigate and easier for reviewers to assess

Artwork and Imagery

InDesign

We recommend building visual layouts in InDesign, as it gives better control over structure and export quality. Set your document to a 4:3 ratio at 1024 x 768 to match iPad dimensions and avoid scaling issues later.

Artwork should sit fully within the canvas. Overhanging objects or loose elements make extraction more difficult and increase the risk of misalignment during development.

Group related elements clearly so that assets can be lifted cleanly without searching through multiple layers.

Outline any text that forms part of the artwork so that it remains stable when exported, especially if it may later be converted into SVG for sharper rendering.

Assets

Veeva does not set a strict file-size limit for images inside HTML content, but performance depends heavily on keeping assets lean.

As a practical guideline, in-slide imagery should remain in the **low-kilobyte range**, with most assets sitting comfortably under **150 KB**. Larger photographic panels may reach **200–250 KB** if clarity is critical but should be compressed as much as possible without affecting quality.

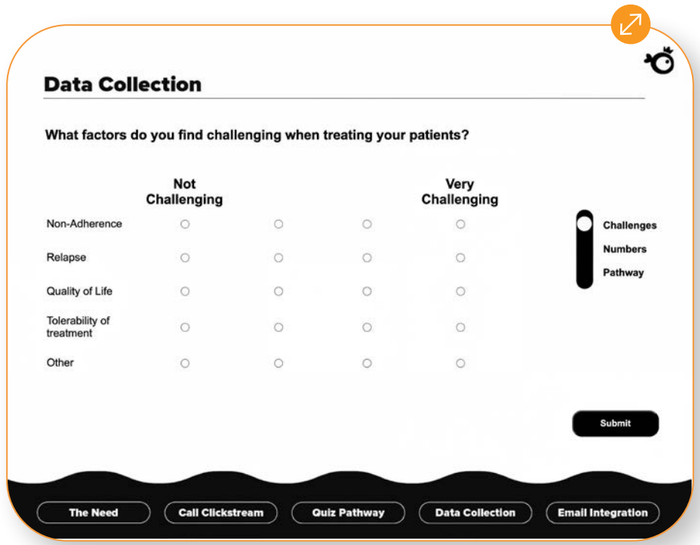
Call Clickstream and Data Capture

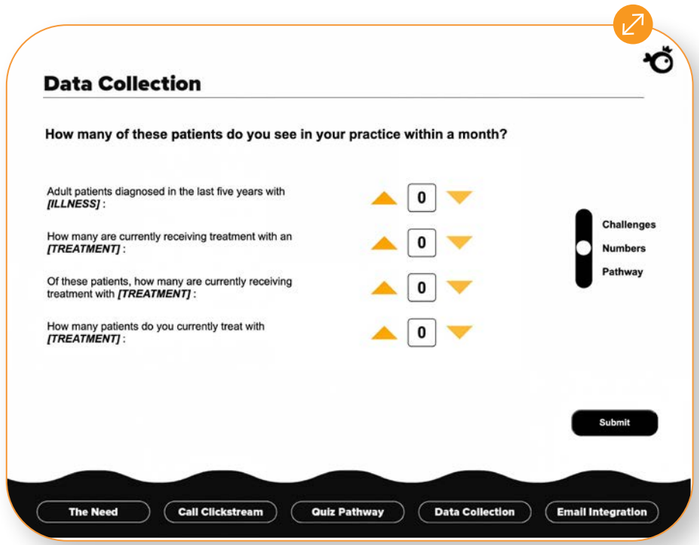
Call Clickstream records specific actions inside a slide, such as taps, reveals or section changes. Each interaction generates a small event that is attached to the call, giving insight into what the HCP is interested in without interrupting the discussion. It works quietly in the background and relies on clear structures and simple navigation to keep the data clean.

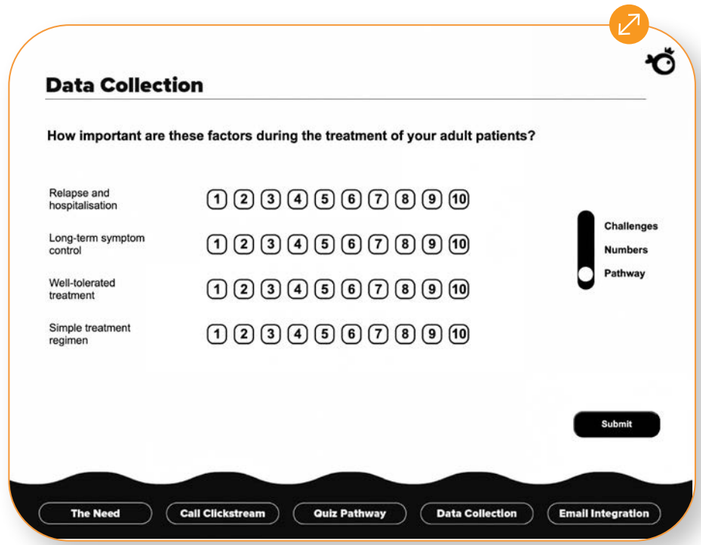
Alongside basic tracking, CLM can also capture direct input from HCPs when designed appropriately. This includes simple questionnaires, quick decision points, pathway-style quizzes or interest selections that personalise the next slide. These interactions can be logged to build a clearer profile of the HCP or guide which follow up email the rep triggers from the deck.

The aim is not just to show information but to learn from the HCP. Early planning during wireframing ensures the right elements are set up for tracking, named cleanly and positioned in a way that keeps the data meaningful. Well-structured data capture helps Otsuka understand engagement patterns and strengthens the value of CLM in the wider commercial journey.

Examples of Data Capture







Examples of Data Capture

Data Collection

What factors do you find challenging when treating your patients?

	Not Challenging			Very Challenging
Non-Adherence	○	○	○	○
Relapse	○	○	○	○
Quality of Life	○	○	○	○
Tolerability of treatment	○	○	○	○
Other	○	○	○	○

Challenges
Numbers
Pathway

Submit

The Need | Call Clickstream | Quiz Pathway | Data Collection | Email Integration

Examples of Data Capture

Data Collection

How many of these patients do you see in your practice within a month?

Adult patients diagnosed in the last five years with ***[ILLNESS]*** : 0

How many are currently receiving treatment with an ***[TREATMENT]*** : 0

Of these patients, how many are currently receiving treatment with ***[TREATMENT]*** : 0

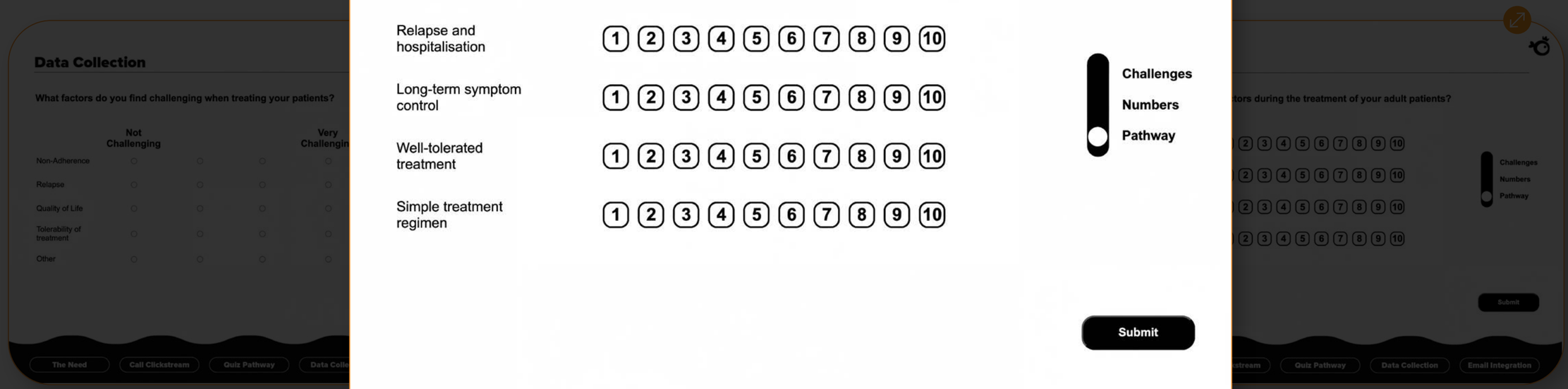
How many patients do you currently treat with ***[TREATMENT]*** : 0

Challenges
Numbers
Pathway

Submit

The Need | Call Clickstream | Quiz Pathway | Data Collection | Email Integration

Examples of Data Capture



Motion and Animation

Veeva's rendering environment is lightweight, so motion needs to be planned with simplicity in mind. The goal is to make slides feel polished without introducing performance issues that slow down or distract from the clinical story.

Overly complex or continuous animations can cause lag on iPad and may not behave consistently across all devices. GIFs should be kept minimal because Veeva struggles with higher frame rates and they can appear choppy. A slow, simple loop is usually fine.

However, Veeva does fully support HTML5 content, so we strongly recommend using basic CSS or JavaScript animations where possible. These are lighter, more reliable on iPad and offer smoother performance than heavy GIFs.

Avoid effects that rely on precise timing. Anything that moves automatically without user input can easily fall out of sync with the rep's conversation, therefore, animations should support the flow rather than control it.

Interaction and Gestures

Interactions in CLM should stay simple and predictable - allowing reps to move through content confidently during a live conversation.

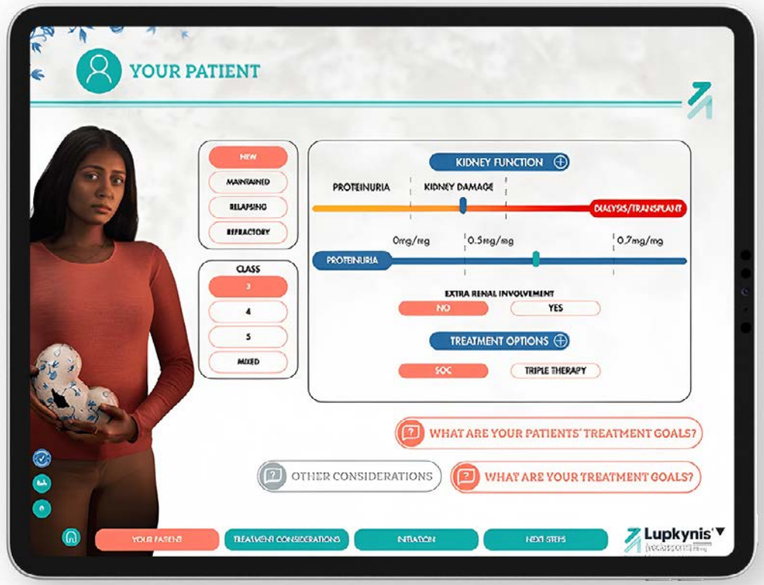
Tap is the primary gesture and will always work best when each action produces a clear, controlled, response - such as revealing content, switching sections or progressing through a narrative. We're encouraging marketing teams to aim for **intentional simplicity,** keeping most interactions lightweight and reserving deeper interaction only where it adds genuine insight.

Swipe gestures should be used with care. Horizontal swipe is reserved for moving between slides, so anything that overrides it can interrupt the presentation flow or cause reps to skip content by accident. Deep layers of popups, large modal stacks or game-like interactions often slow the deck down and make conversations harder to control.

Tap Gesture - Majority Actions

Swipe Gesture- Navigation of Material

Keeping CLM Lean



CLM performs best when slides are built with a lightweight structure. HTML content should stay simple, using clean markup, minimal JavaScript and styles that load quickly on iPad. Anything unnecessary adds weight and increases the risk of slow transitions, visual stutter or unexpected behaviour in offline mode.

External libraries should be avoided unless agreed in advance, as CLM cannot rely on network access and does not benefit from large frameworks. Each slide should also be self-contained, without shared global files or central scripts that break once content is approved in Vault. Keeping assets optimised and appropriately compressed is essential for smooth performance.

CLM is not a full website environment, so the focus should be clarity, speed and reliability.

VAEs

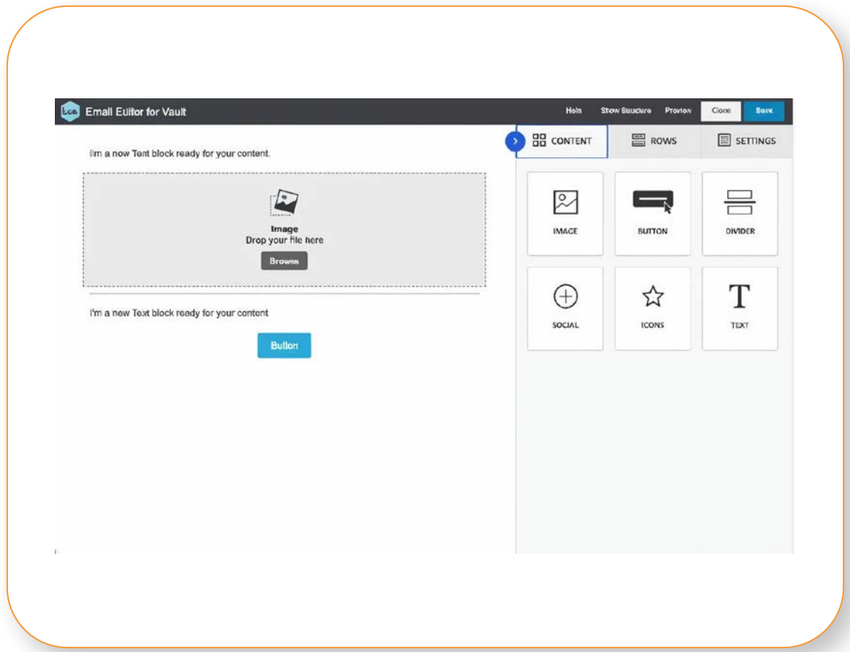
Veeva Approved Email has its own limitations, and so designs need to be simple, structured and built with HTML that behaves consistently in Outlook, Gmail and mobile environments.

VAEs rely on predefined tokens, fixed-width layouts and strict styling constraints. Because of this, strong visual design comes from clarity rather than complexity.

Content should highlight key messages without relying on advanced layouts or heavy imagery.

A well-planned VAE also supports tracking, allowing teams to understand which materials are opened and which links drive engagement. Keeping the structure lightweight ensures reliable delivery, avoids rendering issues and helps maintain a consistent experience across markets.

Designing for VAE Layouts



VAE emails need to stay within a fixed-width layout, ideally 600px, to render consistently across platforms.

Whether building in HTML or BEE, layouts should rely on simple table structures, clear spacing and basic, reliable HTML tags. Complex arrangements or experimental styling often break once the email is sent.

Headlines, body text and CTAs should generally follow a single column structure with generous padding.

Images should be compressed and sized to match the layout to avoid load delays.

We advise to condense information as much as possible, this could mean linking to external sources or hosting longer materials elsewhere, so the email remains light, scannable and easy to deliver.

HTML Emails

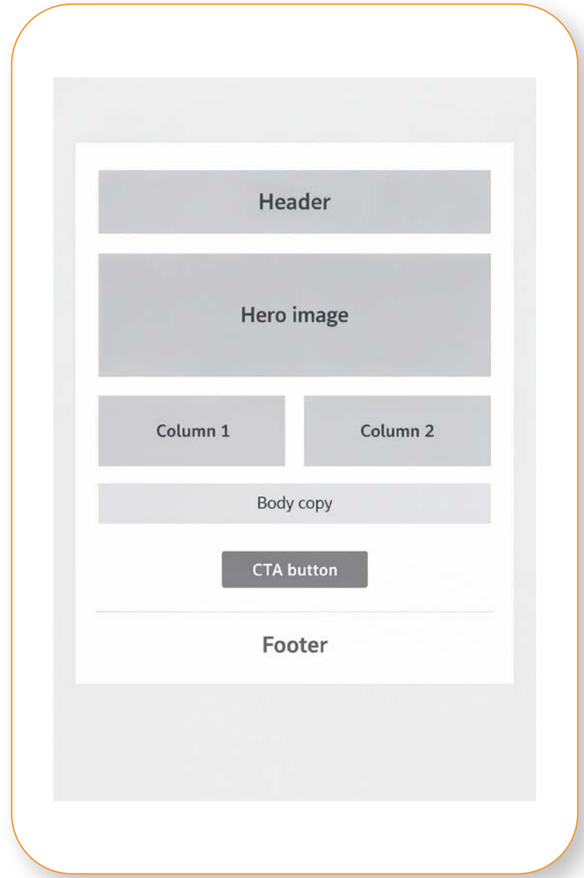
It’s best to build an HTML mailer with simplicity in mind, so that it’s guaranteed that it will work seamlessly on Outlook or other email clients.

Building with tables and a single column will maintain a simple layout, as more complex layouts are likely to break within Outlook. Aim to use email-safe fonts such as Arial or Helvetica so that it will load within any email client. If a web-based or custom font is being used, make sure to back it up with an email-safe font.

Styling should remain minimal. Inline CSS is required, and only safe properties should be used.

Do not apply styling to elements like <sup> or <sub>, as these behave differently across clients and can shift unexpectedly.

Avoid advanced selectors, background images and any CSS that relies on modern browser support.



Motion and Video

Example of VAE with a static thumbnail that is linked to a hosted video.

GIFs

VAEs support GIFs, but they need to stay small and simple to load reliably across email clients. Use lightweight loops only, avoid large dimensions and keep file sizes low to prevent slow delivery. GIFs work best for subtle motion, not for long sequences or anything that mimics full video playback.

Video

VAEs cannot play embedded video. When video is needed, use a static thumbnail or a simple faux-play GIF and link it to the hosted video on a site or portal. The thumbnail must clearly show that it's clickable, using an obvious play icon or overlay.

VAE's support GIFs, but do not support video files.

Limitations of Outlook

Outlook blocks images by default, which often triggers a **‘Download images’** prompt. This can break the reading flow and reduce engagement, so emails should keep visuals lean and purposeful.

Common outlook behaviours:

- Multiple images increase the chance of the “Download images” warning
- Large or heavy visuals slow delivery and may not display reliably
- Background images are ignored
- Some clients block images entirely unless the sender is trusted

Attachments are not recommended:

- Many clients treat attachments as a security risk
- They can trigger spam filters
- File types may be stripped out
- Linked resources are far more reliable than attached files

CSS Code	Function
Background-image	Sets a background image instead of <img>
@media queries	Changes layout per screen size
Border-radius	Rounds corners
Position: fixed/absolute	Pins elements to the screen or container
Display: grid	Builds column/row layouts
Vh/Vw units	Sizes based on viewport
Overflow: hidden	Clips overflowing content
<video>	Embedded media
<button>	Creates a button

Examples of CSS Code which are not compatible with Outlook emails

Artwork and Asset Files

Before building a VAE, it's common to receive either a PDF or Word document showcasing what the client would like the mailer to look like.

It's suggested that the PDF version is designed using either Adobe Illustrator or InDesign for a seamless design.

A word document is often used when the mailer design is basic and is known that it will be built with the BEE editor instead of HTML.

Artwork file format:

For a VAE, a folder of artwork files is necessary. This ensures that all assets are available for the build process. The folder should include:

- Final PDF version
- Final InDesign/Illustrator version
- Extracted and optimised images