EGI "Client" Relationship Management Tool

Progress Report

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CRM Basics (a reminder)

- **EGI-InSpire needs to manage its relationships between EGI.eu, NGIs and their potential user leads**
  - Partners and User communities are distributed
  - Start a portfolio of prospective clients and explore the opportunities

- **EGI CRM Goals**
  - Detect which projects (ESFRI, INFRA, National, others…) are out there and their contacts
  - Detect which research institutions are working in which projects, and to which researchers should NGIs and EGI talk to.

- **CRM is aimed to EGI.eu and NGI staff**

CRM Model (a reminder)

Account — A record for a "client" endpoint (ESFRI projects, National projects, Other international projects, Research Institution)
Ex: LIFEWATCH, ANAEE, Academy of Athens

Contact — A record for a person associated under an account. Used to record conversations.
Ex: Sheila Anderson, Lucia Banci, ...

Project — Long term work (tasks, milestones) related to a Contact or to an Account

Activity — Short term work (calls, ToDos, events) related to a Contact or to an Account

CRM Access (a reminder)

- **Authentication (*http://crm.egi.eu*)**
  - Via EGI SSO (but we need to know your EGI SSO in advance)
- **Authorization**
  - NILs and NGI staff can read all information, can only modify information associated to their NGI
  - EGI.eu staff can read and modify all information
- **Documentation (*https://wiki.egi.eu/wiki/CRM*)**
  - General Usability of the tool
  - Procedure for Account / Contact creation (with videos)
  - Customization (Generation of reports, filters …) (with videos)

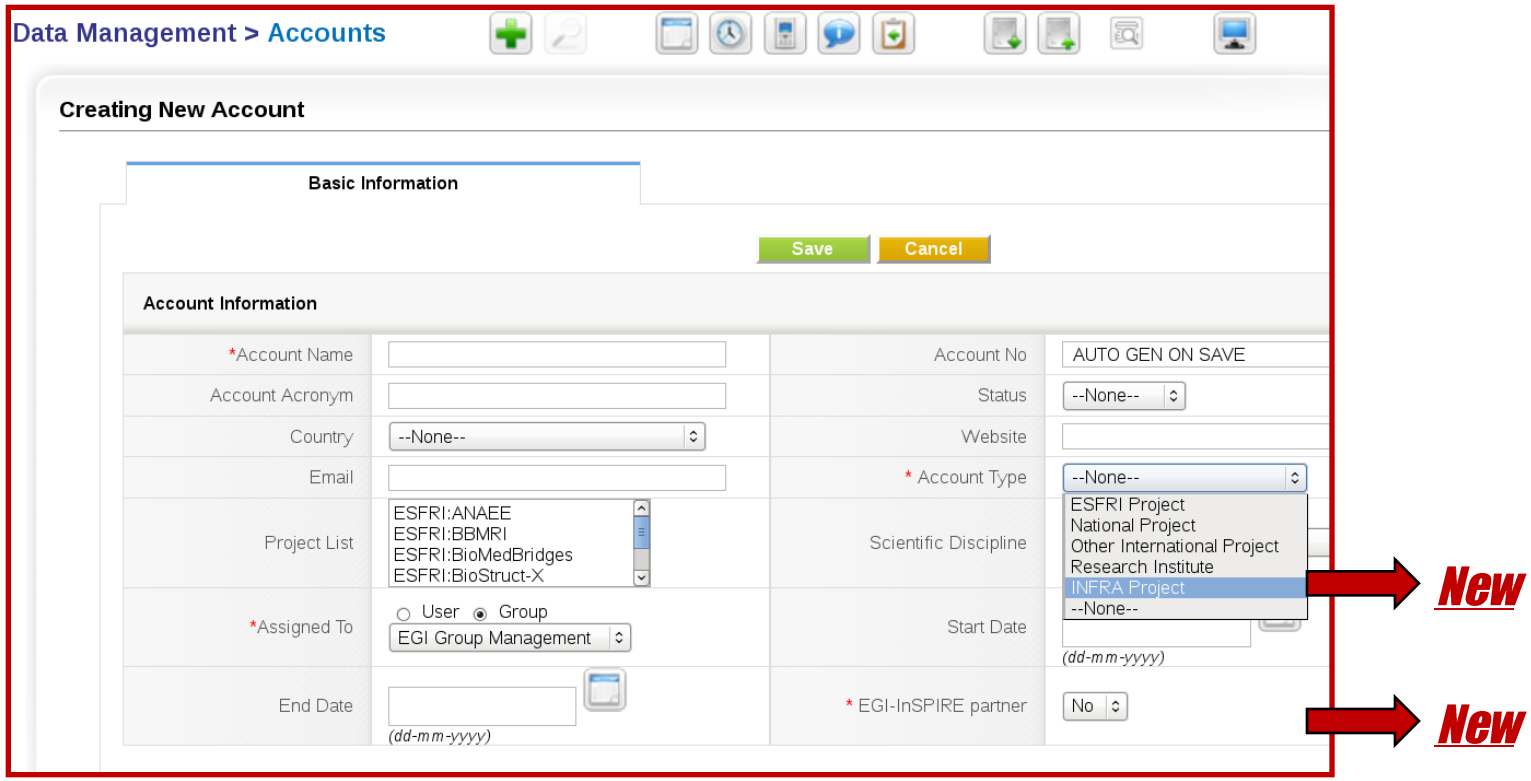
CRM – What's New

- **Major Enhancements**
  - Modification of Data Structures & Automation of Tasks
  - New CRM Module Dashboard & New CRM Reports
  - New Metrics Web Page (developed from scratch)
  - Bug Fixes and other minor tasks (Google Analytics, Monitoring …)

- **Developments**
  - Test vtiger 5.4.0

- **Documentation**
  - Updated (with several videos included)

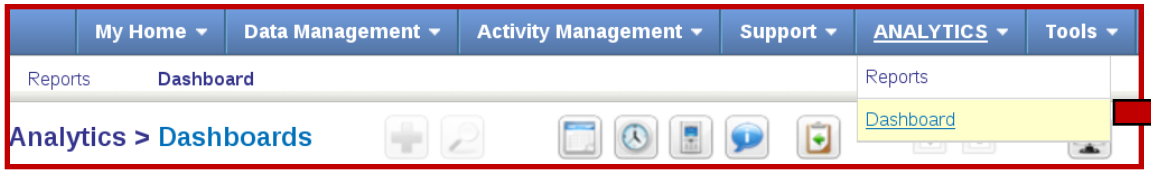
New Data Structures and Automation

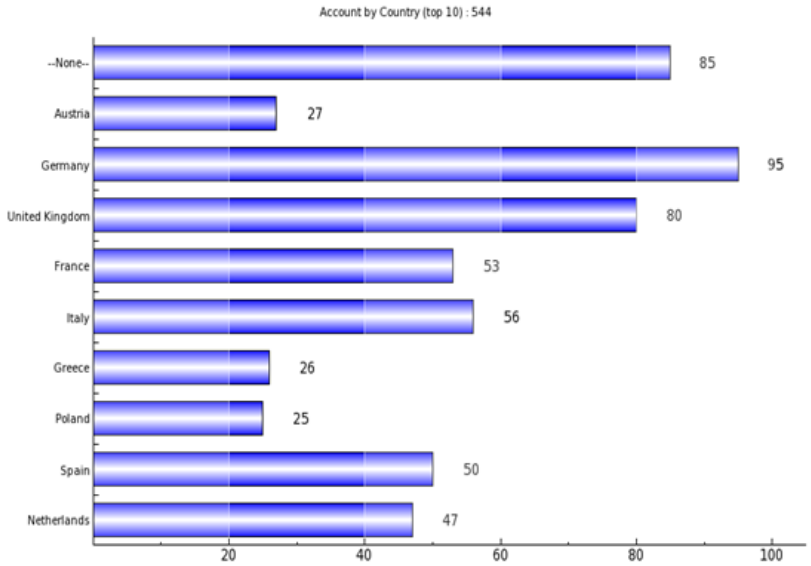


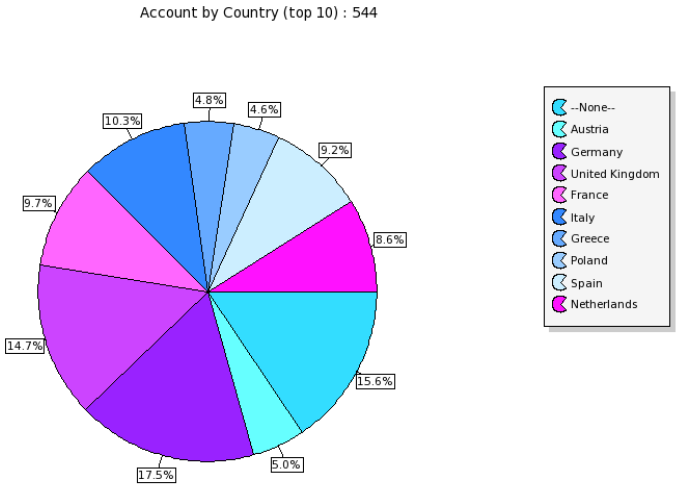
- **Automation**
  - Workflow for the automatic update of the “Project List” (first time the account is saved or that specific account field is modified
  - Increase robustness of the workflow

New CRM Dashboard Module

- **Adapt CRM Dashboard Module**
  - Graph with “Accounts by Country (Top 10)”
  - Graph with “Accounts by Discipline”
  - There is potential for further customized graphs. Needs feedback…

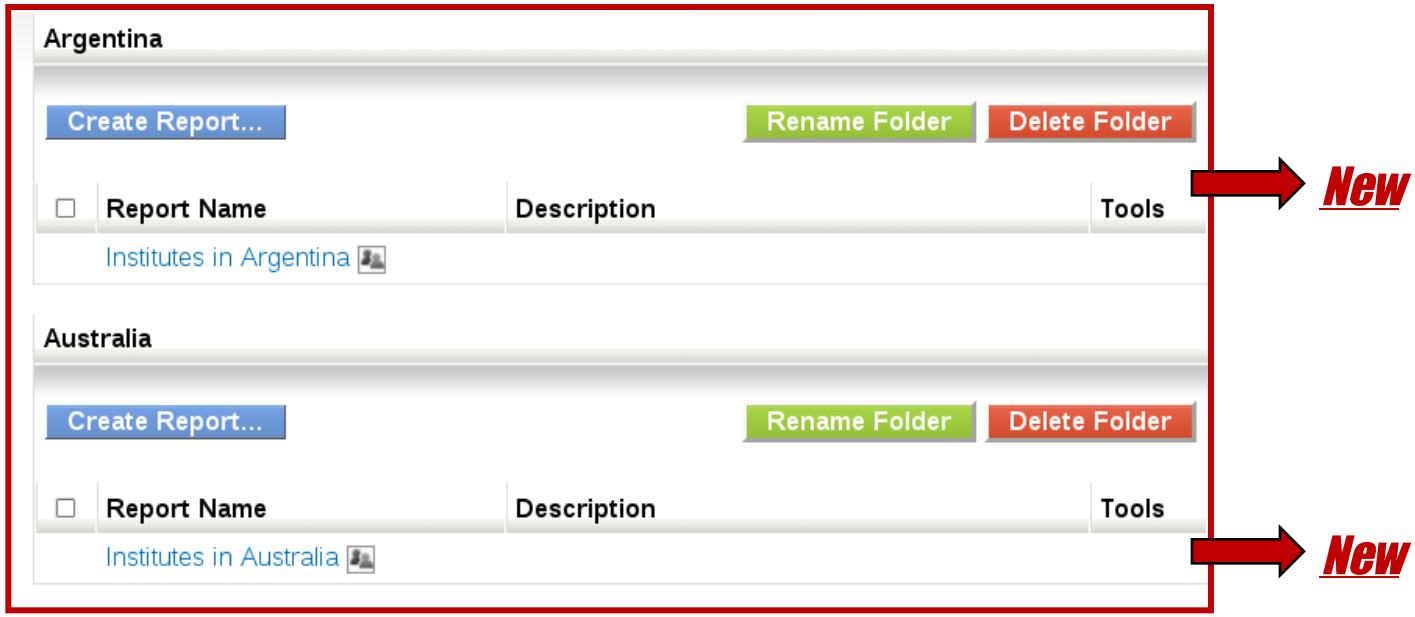






New CRM Reports

- **Creation of folders per country (**Analytics → Reports)
  - Folders may contains customised reports generated automatically (each week, each month, each year)
  - NGI staff may create their own reports (based on the available data)
  - An initial report is created “Institutes in <Country>”



New CRM Metric Web Page

- **Easy mechanism to collect metrics**
  - ***https://crm.egi.eu/metrics_reports_index.php***
  - New accounts / contact / documents in a given period per NGI
  - Modified accounts / contact / documents in a given period per NGI

CRM METRICS

Option: accounts

Start Date:

End Date:

Show Stats

accounts

Back

New

Start time: 2012-09-01 00:00:00 End Time 2012-09-31 23:59:59

NGI	TOTAL ACCOUNTS	TOTAL ESFRI ACCOUNTS	TOTAL INFRA ACCOUNTS	TOTAL RESEARCHs ACCOUNTS	NEW ACCOUNTS	NEW ESFRI ACCOUNTS	NEW INFRA ACCOUNTS	NEW RESEARCH ACCOUNTS	MODIFIED ACCOUNTS	MODIFIED ESFRI ACCOUNTS	MODIFIED INFRA ACCOUNTS	MODIFIED RESEARCH ACCOUNTS	Potential for EGI use	Interest for EGI use
EGI Group Management	151	55	26	70	0	0	0	0	0	0	0	0	27	56
NGI Australia (ASGC)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
NGI Belgium (BE)	20	0	0	20	0	0	0	0	0	0	0	0	0	0
NGI Bulgaria (BU)	5	0	0	5	0	0	0	0	0	0	0	0	0	0
NGI Croatia (HR)	5	0	0	5	0	0	0	0	0	0	0	0	0	0
NGI Cyprus (CY)	3	0	0	3	0	0	0	0	0	0	0	0	0	0
NGI Czech Republic (CH)	17	0	0	17	0	0	0	0	0	0	0	0	0	0
NGI Denmark (DK)	11	0	0	11	0	0	0	0						
NGI Estonia (EE)	3	0	0	3	0	0	0	0						
NGI Finland (FI)	18	0	0	18	0	0	0	0						
NGI France (FR)	53	0	0	53	0	0	0	0						
NGI Georgia (GE)	0	0	0	0	0	0	0	0						
NGI Germany (DE)	95	0	0	95	0	0	0	0						

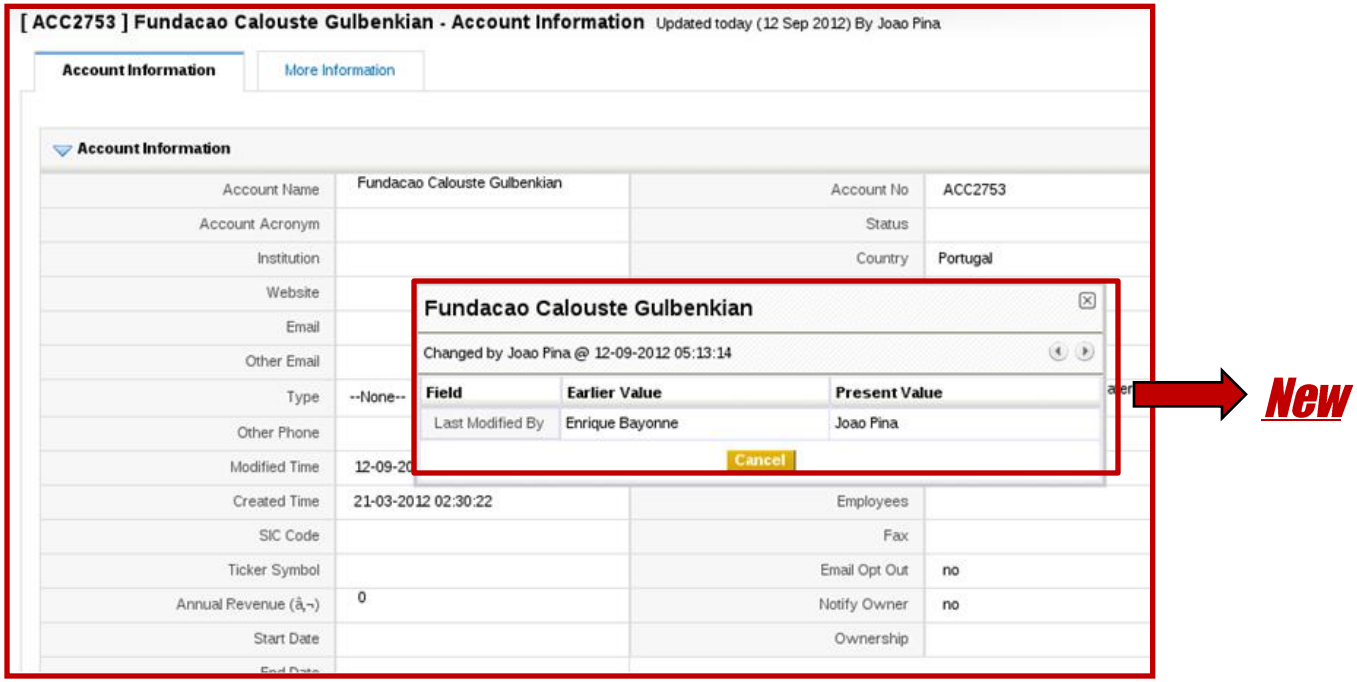
Total Accounts: 825

Total Contacts: 39

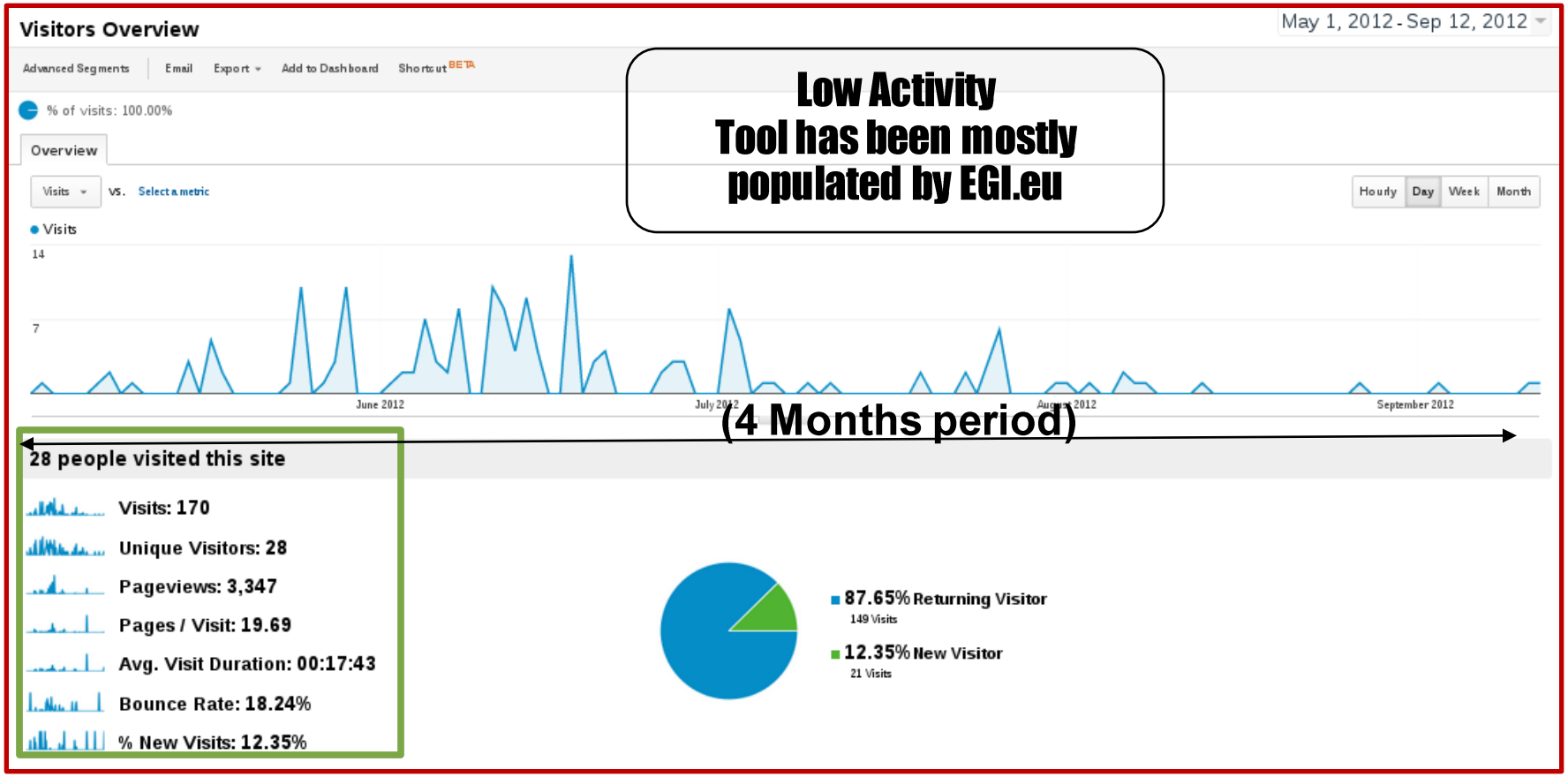
Total Documents: 0

Developments

- **Test new vtiger stable version 5.4.0**
  - Testing instance deployed at UPV
  - Motivation: New ModTracker tool: Keeps log history of all modified fields for accounts and contacts
  - Problem: Port all the integration work already done in 5.3.0 to 5.4.0



CRM Activity



Summary and Conclusion

- **The tool has been enhanced since EGI CF 2012**
  - New functionalities and features in place
  - Probably many things that are still missing to be addressed in the right way

- **It is a tool for NGI staff**
  - What can we do better?
  - Does it correspond to you needs?
  - We deeply need your feedback… No point in developing a tool that is not used by anyone.