

# EGI CRM Training

*Friday, 12 April 2013 11:00 (1h 30m)*

## Impact

The “EGI CRM Training” session at the EGI Community Forum 2013 is targeted to provide EGI.eu and NGI members the proper information and support using the CRM system along precise use case scenarios expected to be faced by NGI members during EGI-InSPIRE lifecycle. It will contribute to decrease the CRM learning curve steepness, and boost the CRM use within the EGI community. This is a fundamental step to promote the usability of the tool, and prove its added value for the project.

## Summary

The EGI-InSPIRE project is under the process of promoting an optimised management of relationships between EGI.eu, NGIs and their potential users. Under that context, a CRM system has been deployed by the project for the EGI community in March 2012. The CRM system simplifies the process of identifying, contacting, following-up and evaluating new user community needs and mapping those needs to EGI services.

This “EGI CRM Training” session at EGI Community Forum 2013 is targeting EGI.eu and NGI members who work in the community outreach and technical outreach areas. During the training, through use case-oriented “hands-on” exercises, attendees will perform real outreach activity and learn how to continue this activity from their home institute using the EGI CRM system.

## Description

Customer Relations Management (CRM) are technological solutions used by organisations to track the involvement of important relations with their clients, share information within the organisation members, and identify new business opportunities. CRM tools are considered valuable assets for any organisation since they ease the process of identifying, contacting, following-up and evaluating client needs and satisfaction.

The EGI-InSPIRE project needs an optimised management of relationships between EGI.eu, NGIs and their potential users because:

- EGI partners and their “clients” are distributed and the conversations happen at different places, context and time;
- EGI partners have to share the information they gather, and pass it around to build a proper support network;
- EGI-InSPIRE project needs to construct a portfolio of prospective clients and explore the opportunities.

A CRM system has been deployed by Ibergrid in the EGI-InSPIRE project in March 2012. CRM target those members of the EGI community who are focused on gathering information regarding scientific organisations, their contacts, the scientific projects they are participating in, and what needs and requirements do they present. Gathering this information is a fundamental step to identify the problems faced by the user communities, and understand how EGI may provide the proper solution, and bring the user community on board.

This tutorial is targeted to EGI.eu and NGI staff, which are the main users of the system. It will consist on “hands-on” exercises, focused on precise use-case scenarios, that will help NGI member to:

- 1) Record user community contacts and any associated information based on interview and discussions;
- 2) Gather intelligence about scientific communities, institutes and projects and about topics of collaboration with them;
- 3) Monitoring activities and progress in community outreach topics
- 4) Help NILs and EGI.eu staff to locate expertise inside NGIs

**Primary authors:** BAYONNE SOPO, Enrique (UPVLC); BORGES, Goncalo (LIP); ANTONIO TOMASIO PINA, Joao (LIP)

**Presenters:** BAYONNE SOPO, Enrique (UPVLC); BORGES, Goncalo (LIP); ANTONIO TOMASIO PINA, Joao (LIP)

**Session Classification:** Training

**Track Classification:** Community Coordination and Communication (Track Lead: C Gater and S Andreozzi)