

Client Relationship Management Overview

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- **New orientation towards:**

- Winning new user communities
- Enhance the relationship between policy, dissemination, training and support
- Task forces (virtual teams) to address specific issues and help the new communities to takeoff successfully

- **Provide a database of expertise and knowledge to support the above objectives:**

- Help managing virtual teams and track their activities
- Assist in identifying expertise and task overlaps
- Cross pollinate knowledge and expertise across teams

- **Put main focus on:**
 - Manage knowledge and expertise as an asset
 - Provide an integrated work framework while approaching the user
- **Concrete proposals (from last PMB):**
 - **EGI / NGI Compendium**
 - Register and describe the NGIs and the European Grid following a model similar to TERENA Compendium
 - **An EGI CRM (Client Relationship Management)**
 - CRMs are used to organize, automate and synchronize business processes towards better managing interactions with the customers
 - Focused on retaining current users and gain new customers

- **Sales Automation**

- Manage many of the tasks of performed by the sales staff
- Track and record every step of the sales process for every prospective customer

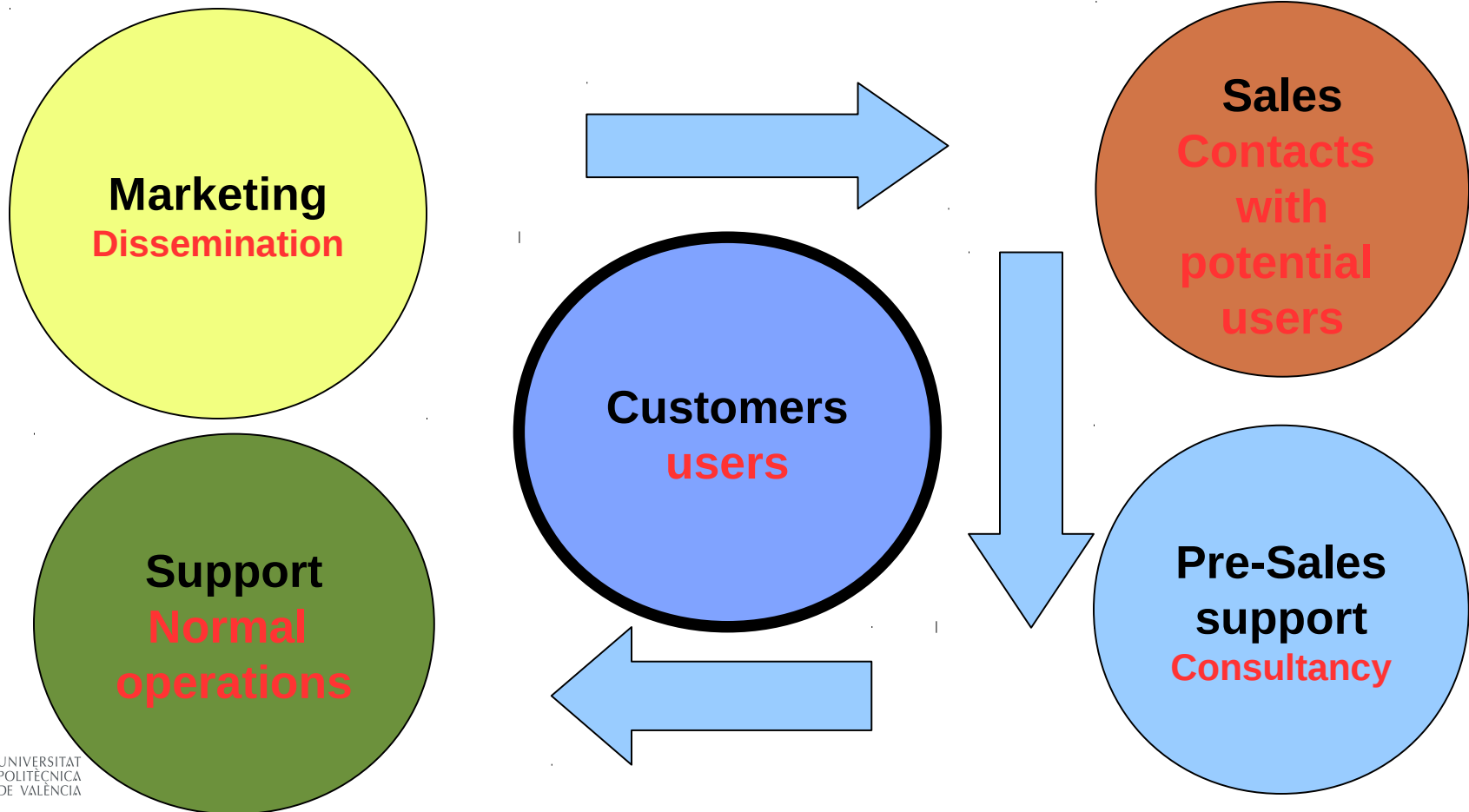
- **Marketing Management**

- Identify and target its best customers and generate qualified *leads* for the sales staff

- **Customer Service and Support**

- Tracking and management of customer services activities and support issues

Working together more efficiently with one centralized view of the customer

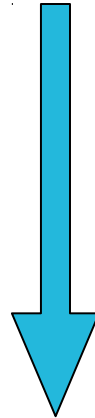


- **Common questions to evaluate the need:**
 - How marketing gathers information about clients?
 - How does it pass it to sales?
 - What is the escalation process for a client open case?
 - How does support follow up a client request?
 - Are all your departments collaborating effectively?
 - Can different staff access to all the client records / transactions / communications ?
 - Are all processes defined and known by everybody?
 - How can we assess them?
 - How can we measure the effectiveness of the overall process and determine inefficiencies?



Customers
users

- **User database**



- Leads: Prospective customer
- Potential: Lead on which to focus
- Contacts: Created once a lead becomes a potential
- Accounts: Customer account record

- **Campaigns (emails, web, phone)**

- marketing efforts to generate new leads and potential users

- **Keep track of users - EGI/NGI interactions**

- **Structure the process of acquiring new users and support them across all the steps:**
 - dissemination, induction, training and support
- **A mechanism to manage the EGI internal actors and their communications / interactions in a user centric way:**
 - NGI liaison, dissemination people, support experts, resource providers, trainers, infrastructure managers.
- **Track documents and communications, pass opportunities and access information from a central system of record.**
- **Measure the user induction effectiveness**

- **There are plenty opensource CRM solutions**
 - **SugarCRM (<http://www.sugarforge.org>)**
 - Both commercial and opensource.
 - Advanced features only in the commercial versions.
 - LAMP
 - **Vtiger (<http://www.vtiger.com>)**
 - A SugarCRM fork aimed to be easier to setup and use
 - 100% Open Source (LAMP)
 - **Concursive (<http://www.concursive.com>)**
 - Community oriented with support for social networks and CRM
 - Java based
 - **Hipergate (<http://www.hipergate.org>)**
 - Claims to be the most complete Opensource Java based CRM

- **Possible roadmap:**
 - Collect requirements
 - Systematize EGI in the CRM context mapping actors and processes to the CRM model
 - Comparative study of opensource CRM systems
 - Pick one and prepare a prototype
 - Iterative process until a production version
 - Consider advanced topics such as further integration with the EGI tools and environment
 - Concern: SSO integration (?)

- **Key issues**

- The aim is not to treat users as customers but to adapt the model to EGI needs
- CRM is not a tool to broadcast / merchandise offer but to support the overall process from gathering the users until delivering and supporting the service
- Defining the different EGI actors, their responsibilities and the workflows how they interact will be essential for success
- The definition, population and follow up of the actors assets / expertise must be a permanent job for the task to become sustainable