EGI "Client" Relationship Management Tool

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Outline

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– Basic Functionalities

3. Use Cases

– Recording ESFRI data
– NILs interations
– EGI.eu interactions

4. Final Considerations

1. CRM Basics

Introduction to Client Relationship Management

CRM Basics – Introduction

- ***Customer Relationship Management*** are strategies and technologies used to build stronger relationships with clients
- An institution stores information that is related to their clients, and will spend time analyzing it so that it can be used for this purpose
- The Customer relationship management architecture can be broken down into three categories:
  - ***Operational:*** Automation of certain business processes
  - ***Collaborative:*** Emphasis on client / institutes interactions
  - ***Analytical:*** Process that may lead to strategies or methods changes

CRM Tutorial:
http://www.exforsys.com/tutorials/crm/crm-introduction.html

CRM Basics – EGI need

- ***Why does EGI needs a CRM?***

1. Because EGI clients are distributed

2. Because EGI partners (which talk to the clients) are also distributed

3. Because conversations with the same client can happen at different places, context and time

4. Because EGI partners should share information about who they are talking with

5. Because we would like to construct a portfolio of prospective clients and explore the opportunities

CRM Basics - VTiger technology

- Open Source CRM software built over LAMP/WAMP architecture mainly for small and medium businesses
  – Highly configurable and with a huge set of possibilities (increasing the complexity of management)

- ***Key Benefits***
  – Easy to use
  – Software is free and there is no up-front investment
  – Rich user-experience with product customization
  – Features access to 15 modules covering support, inventory, reports, security management, role provisioning, workflows...

Vtiger CRM Documentation:
http://www.vtiger.com/crm-on-demand/help/

CRM Basics – Main modules

Account

A record for a "client" endpoint
(project, institution, university, ...).
Ex: Lifewatch, Univ. of Glasglow, ...

Contact

A record for a person associated under an account. Used to record conversations.
Ex: , , ...

Project

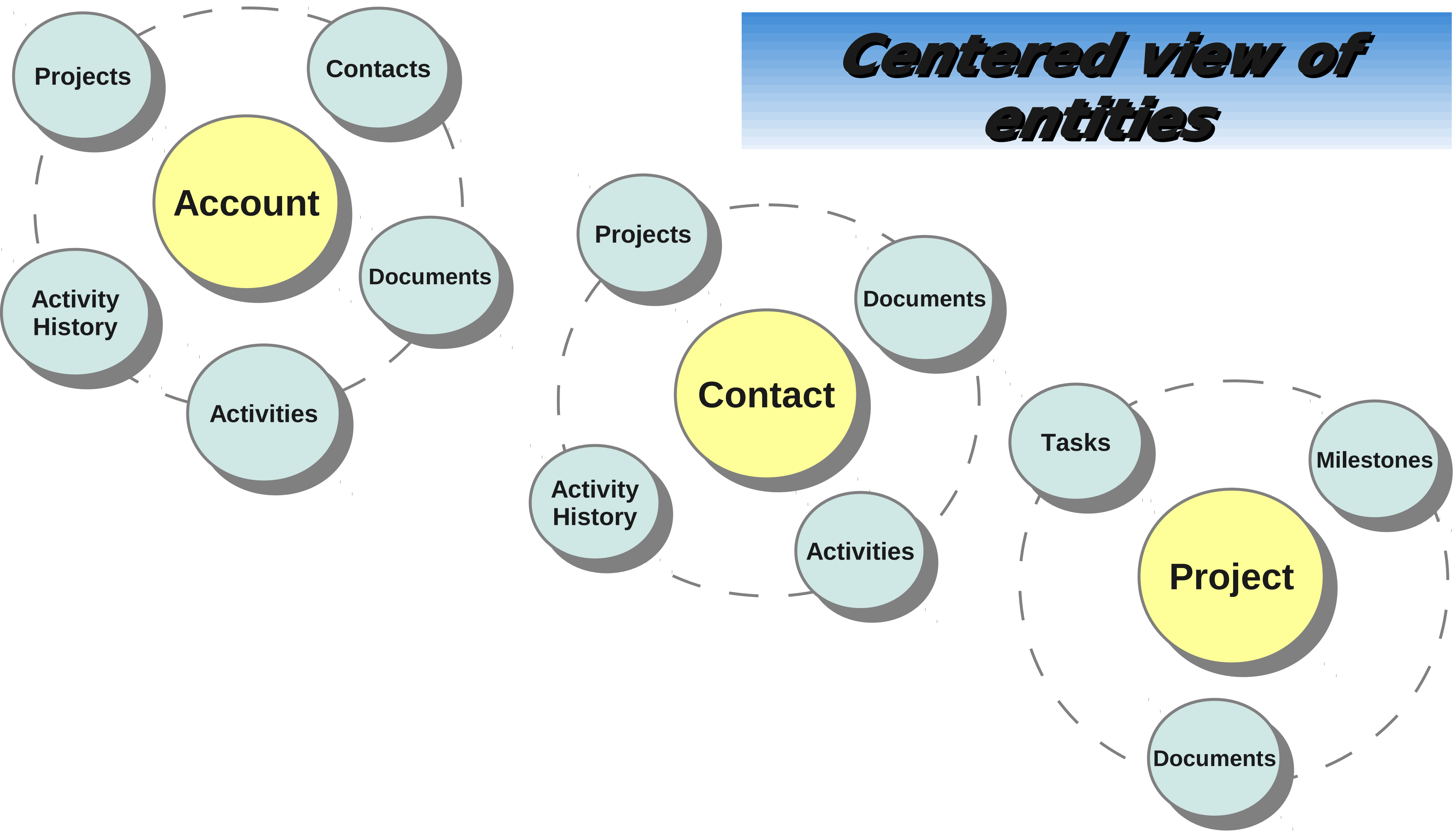
Long term work (tasks, milestones) related to a Contact or to an Account

Activity

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

CRM Basics – Entities model

Centered view of entities



CRM Basics – Authorization

Profile

Groups

Roles

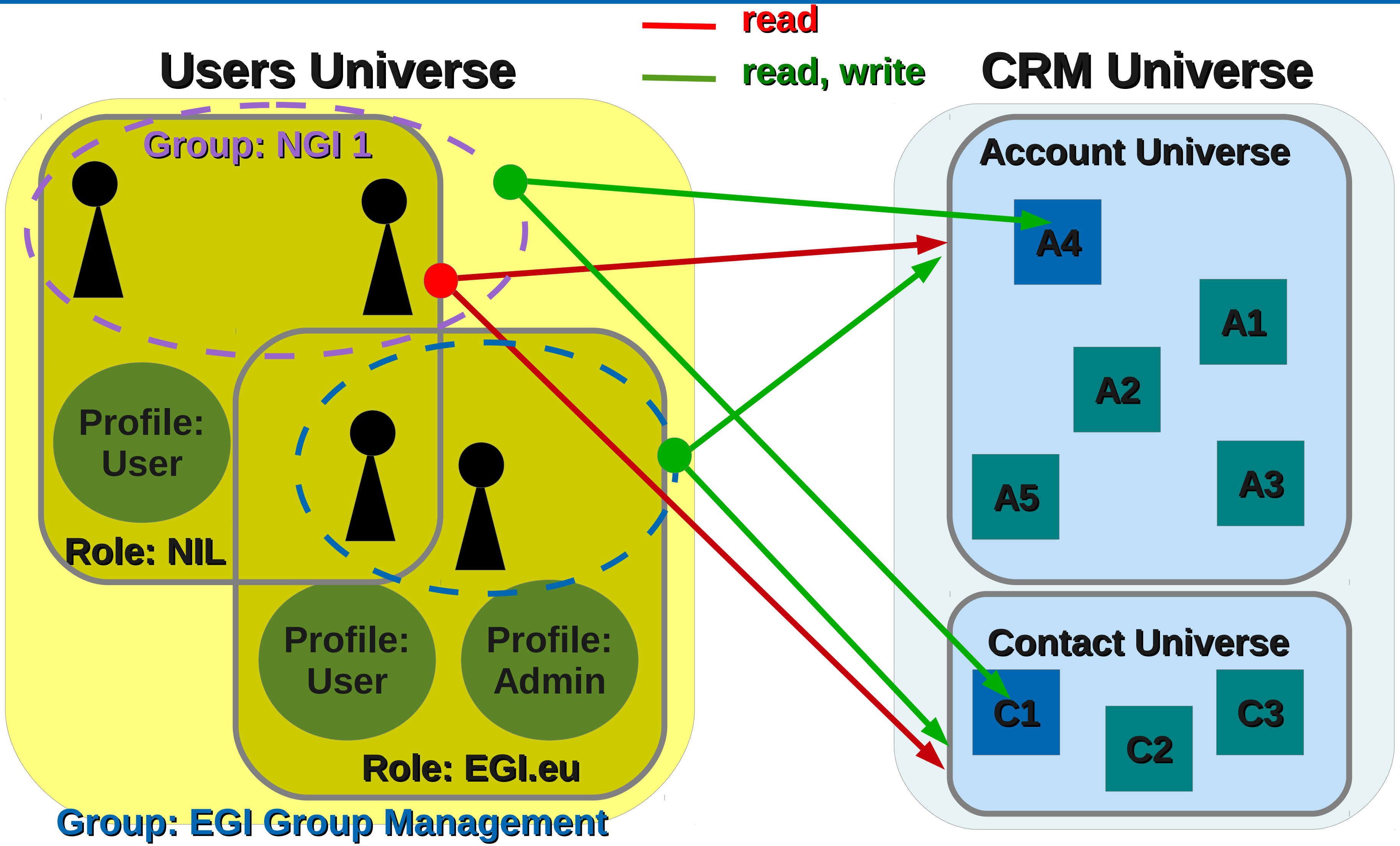
Set of security privileges assigned to users to perform CRM operations

- Privileges are set-up via ***Profiles. Profiles*** are assigned to multiple ***Users and Roles.***

- Roles are organized hierarchically. A user can have multiple Roles which provides an efficient way to assign privileges while performing multiple functions.

- Users and Roles can be gathered in Groups. Specific data, e.g. a specific Account, can be assigned to a Group so that everyone in the group has access to that specific Account data.

CRM Basics – Authorization



EGI CRM – Groups

- ***EGI Management Group***
  – Hability to create ***Accounts***, ***Contacts, Documents and Activities*** and assign them to themselves or to NGI members (person or group)
  – Hability to modify ***Accounts***, ***Contacts, Documents and Activities*** and assign them to themselves or to NGI members (person or group)

- ***NGI <Country> Group***
  – Hability to create ***Accounts***, ***Contacts, Documents and Activities*** and assign them to themselves (person or group)
  – Hability to modify ***Accounts***, ***Contacts, Documents and Activities*** and assign them to themselves (person or group)
  – Hability to read ***Accounts***, ***Contacts, Documents and Activities*** information assigned to other NGIs (persons or groups)

EGI CRM

User guidelines
Basic functionalities

EGI CRM - Access

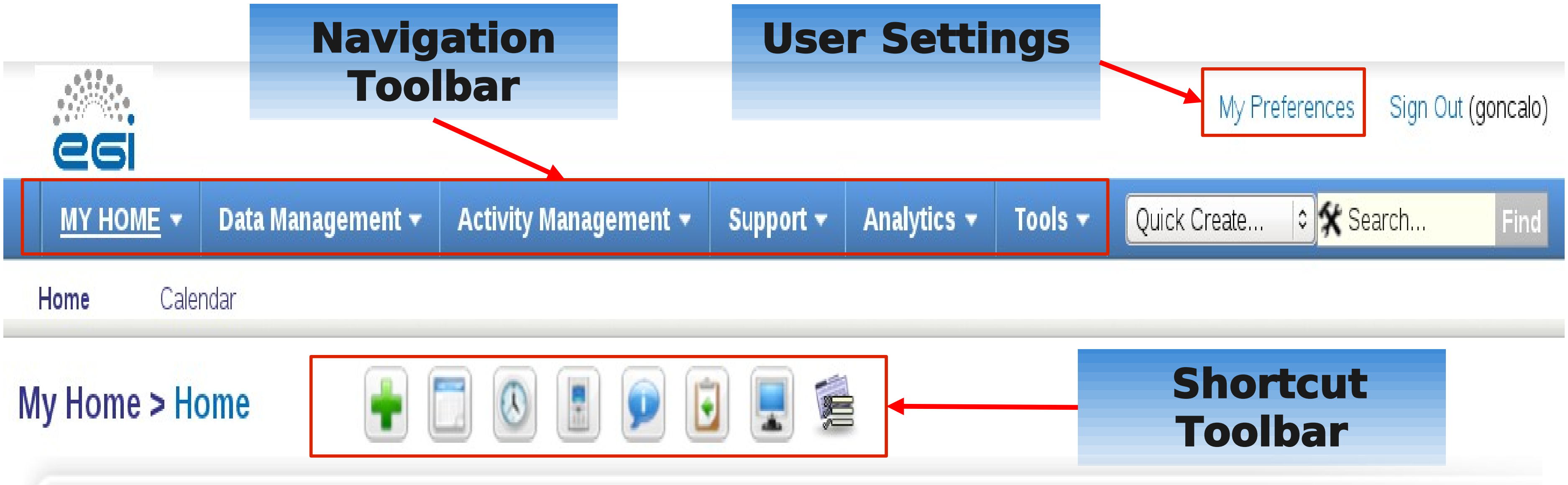
- ***Authentication?***
  - Via EGI SSO
  - Vtiger has been integrated with EGI authentication mechanisms
- ***Who has access?***
  - EGI.eu members
  - NILs (https://wiki.egi.eu/wiki/NGI_International_Liaison)
- ***Someone else needs access?***
  - NIL form a network of trust
  - Requests from NILs will be implemented
  - egicrm.helpdesk@lip.pt

EGI CRM Webpage: https://crm.egi.eu

EGI CRM – login

Authentication using EGI SSO

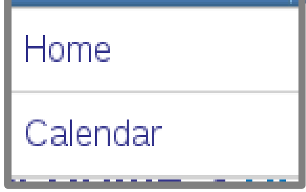
EGI CRM – My Home Page



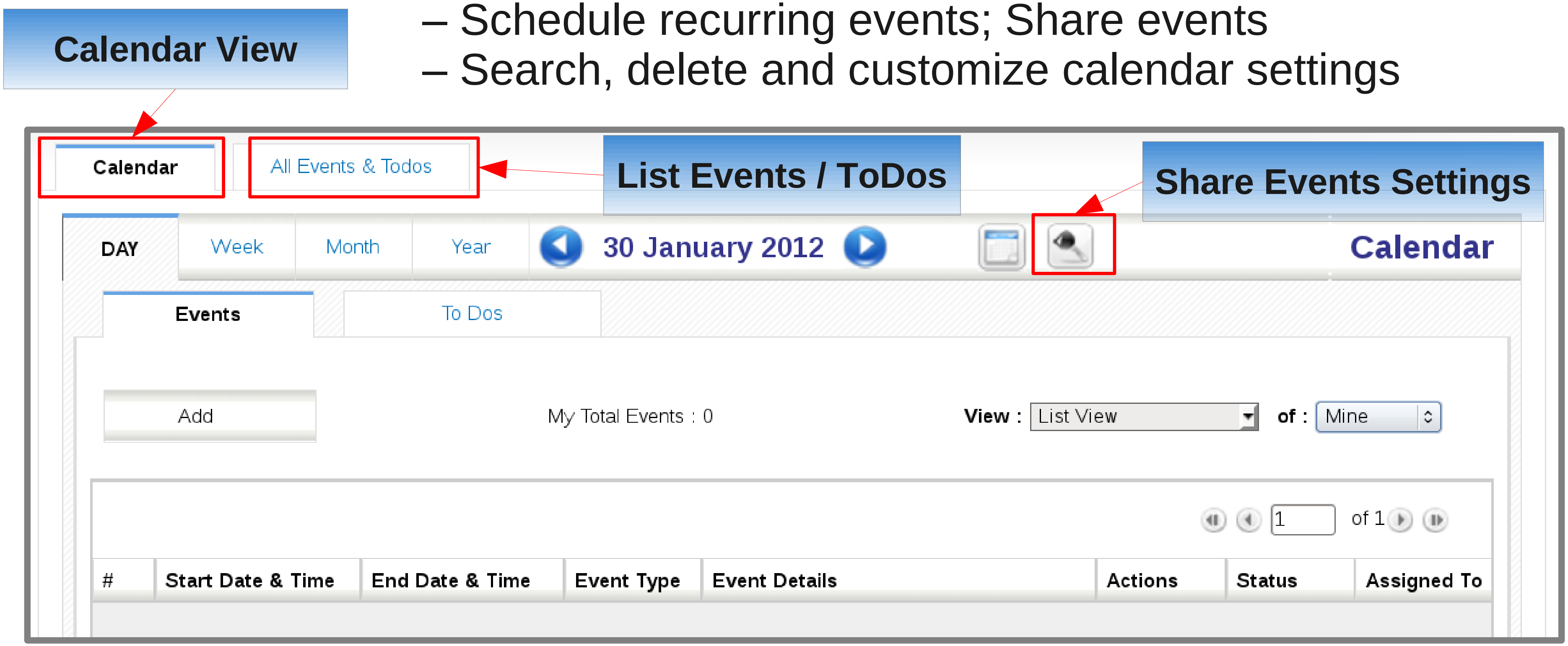
EGI CRM – Navigation toolbar

MY HOME	**User area: User may define his own preferences regarding what info should be displayed**
Data Management	**Manage Accounts and Contacts details; access information about activities**
Activity Management	**Manage Projects, Project tasks and Project milestones**
Support	**Access to support documentation, FAQs**
Analytics	**Reporting capabilities, definition of various reports and dashboards**
Tools	**Tools**

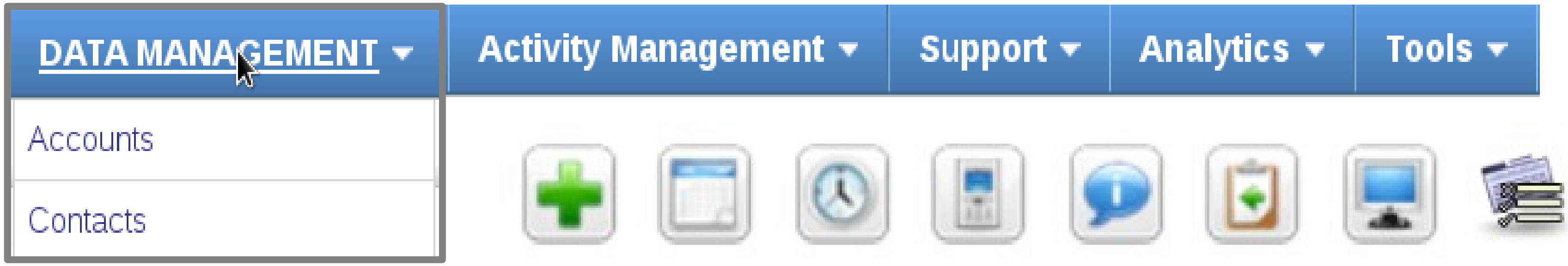
EGI CRM - Calendar



- Calendar operations
  - Add ToDos and / or Events (Calls and Meetings)
  - Associate activities with Contacts and Accounts
  - Schedule recurring events; Share events
  - Search, delete and customize calendar settings



EGI CRM – Data Management



- Add new Account / Contact
  – Select ***Accounts / Contacts*** tabs and hit ( )

- View Accounts / Contacts information
  – Select ***Accounts / Contacts*** tab
  – If the item you want to access is not visible try to search for it. Use the ***Go to Advanced Search*** to restrict your search.
  – Select the item you would like to browse the item information
  – If you are allowed to edit the item, you can manage the item information using the top-right buttons (Edit Duplicate Delete)

EGI Accounts - Browse Information

[ACC848] Comision Nacional De Energia Atomica - Account Information Updated today (07 Feb 2012)

Account Information | More Information

Interacting with a "Contact" is similar as interacting with an "Account"

Account Information

Account Name	Comision Nacional De Energia Atomica	Account No	ACC848
Institution	Comision Nacional De Energia Atomica	Status	
Country	Argentina	Project Membership	ESFRI
Website		Member Of	
Email		Project List	CTA-PP
Other Email		Scientific Discipline	Physical Sciences and Engineering
Type		Assigned To	Others
Modified Time	07-02-2012 12:33:05	Created Time	07-02-2012 12:33:05

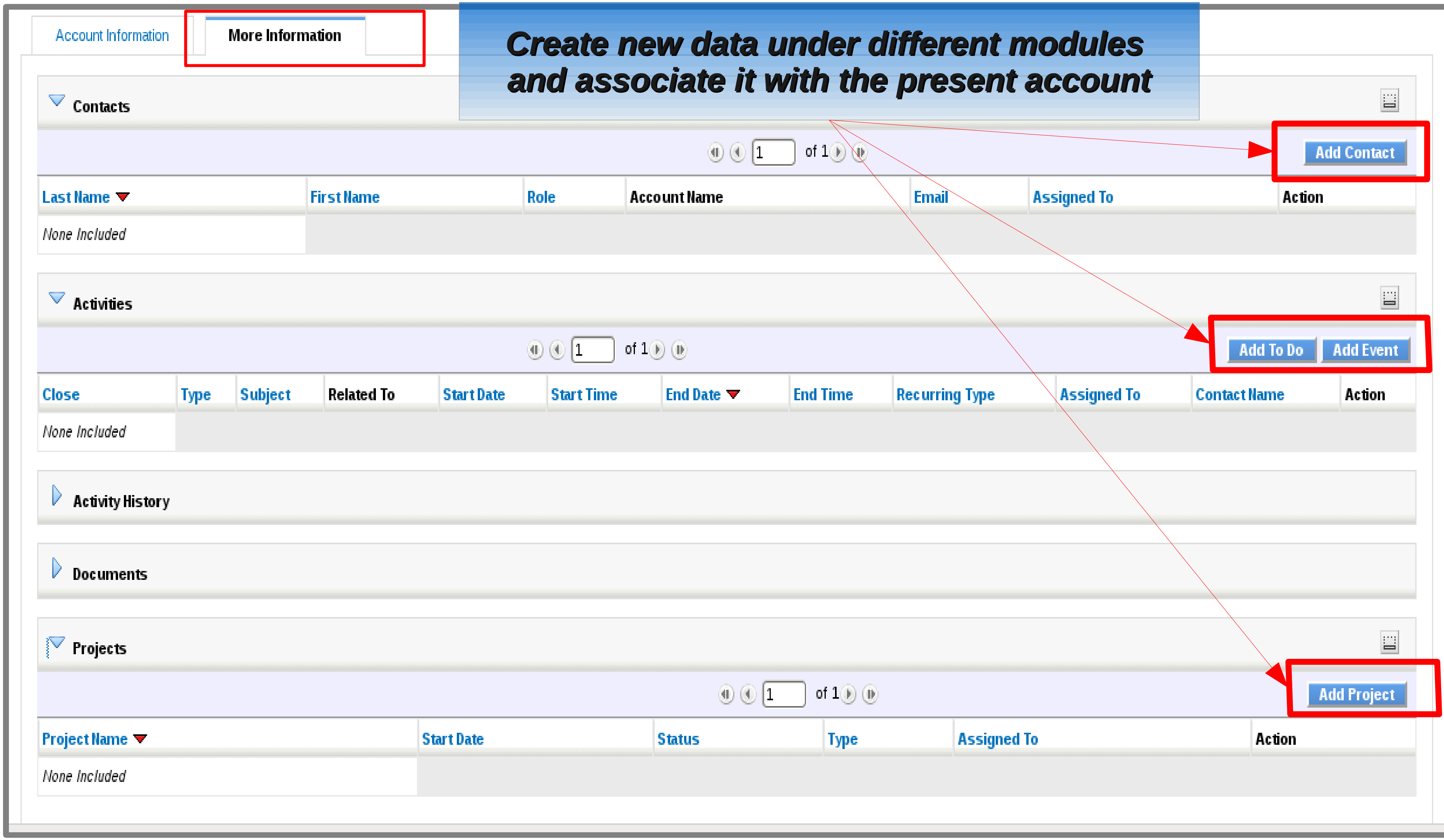
Description Information

Potential for EGI use		Interest in e-Infrastructures	
Description			

Comments Information

Show : All

EGI CRM - Accounts



EGI CRM – Account Dashboard details

Contacts

- Browse all Contacts associated to an account
- Add / Delete / Edit a Contact

Activities

- Browse all ongoing Activities associated to an account (Calls, ToDos, Events)
- Add / Delete / Edit an Activity

Activity History

- Browse all past Activities

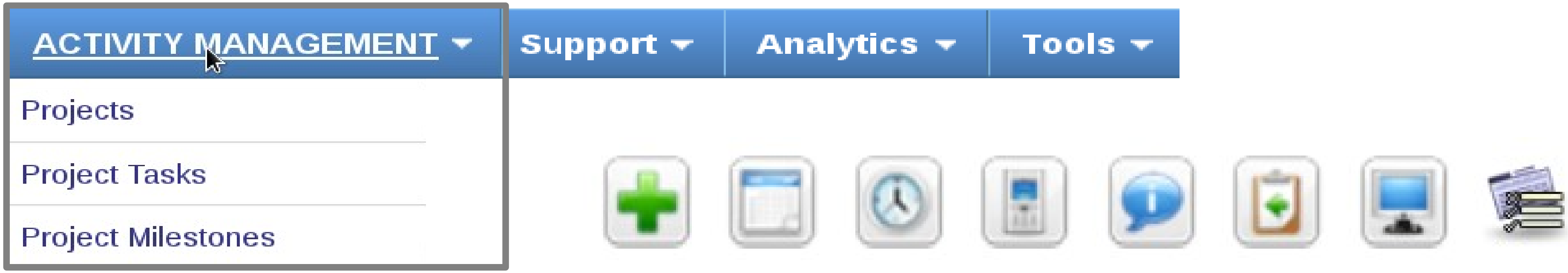
Documents

- Access all Documents stored under the Account context

Projects

- Browse all ongoing Projects associated to an account
- Add / Delete / Edit a Project

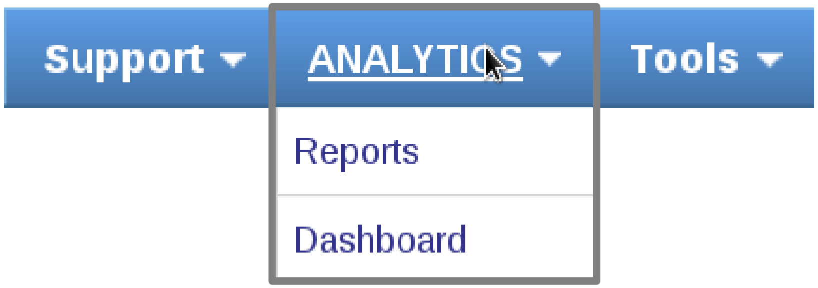
EGI CRM – Activity Management

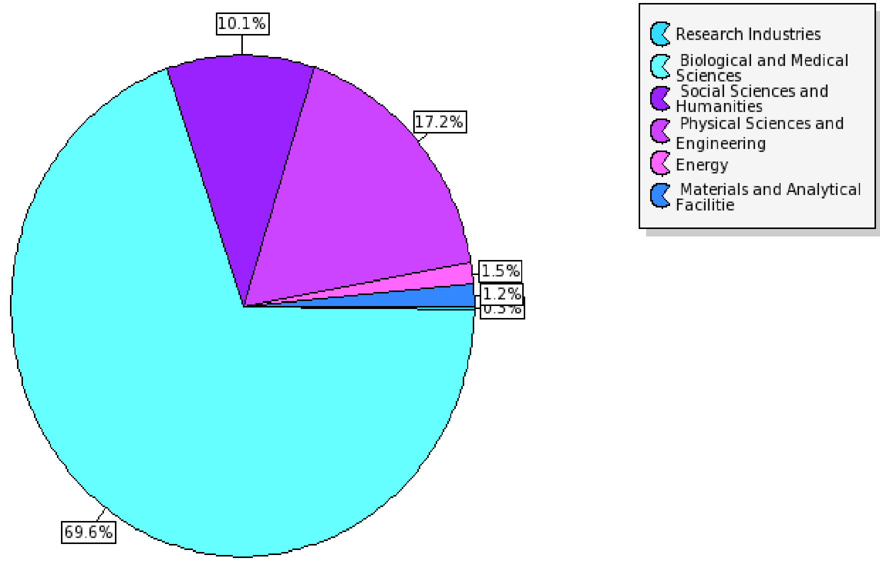


- Manage ***Project, Project task*** or ***Project Milestone*** similarly as done for Accounts and Contacts
  – Select the appropriate tabs and hit ( ) to add a new item
  – If an existing item is not visible, try to search for it. Use the ***Go to Advanced Search*** to restrict your search.
  – If you are allowed to edit the item, you can manage the item information using the top-right buttons (**Edit** **Duplicate** **Delete**)

- Project dashboards provides you a centralized view of all projects tasks, milestones, documents and project evolution

EGI CRM – Analytics



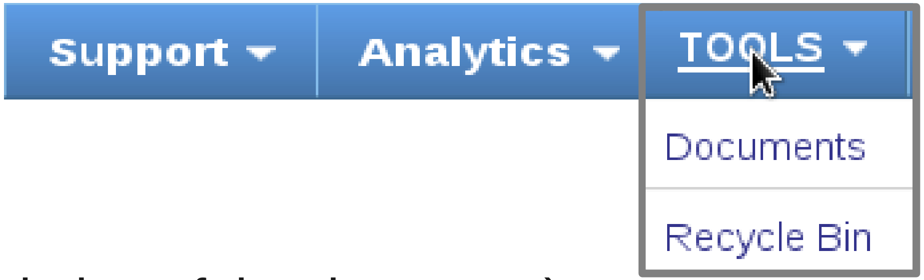


- *Reports and Dashboard*
  - Access pre-defined reports
  - Save a report
  - Export results as xls or pdf
  - Set a frequency for building reports and email them
  - Create folders to store your reports
  - Build your criteria and create your own reports
  - Visualize your report in a graphical format

Explored further in the Use Cases Scenarios

EGI CRM – Support & Tools

- Support
  - Build a new *Frequent Asked Question Document (FAQs)*
  - Access a full list of available *FAQs*
  - Search *FAQs*



- Tools
  - Insert a new document
    - Internal: Browse local folder
    - External: url (http://)
    - Possible to add notes (brief description of the document)
  - Access a full list of available *Documents*
  - Search through all *Documents*

EGI CRM – Support & Tools

Basic View of an Document Information

Document Information

Edit | Delete

Basic Information

Title	Document 6	Folder Name	Default
Document No	DOC6	Assigned To	NGI Portugal (PT)
Created Time	2012-02-09 14:43:05	Modified Time	2012-02-09 14:43:05

Description

Notes	Blah

File Information

Download Type	Internal	Active	yes
File Name	accounts_template_01.xls	Size	29.5 KB
File Type	application/vnd.ms-excel	Version	1.0
Download Count	1		

Actions

- Download file
- Check file integrity
- Email file as attachment

Document Information

Edit | Delete

Documents can be associated with Account / Contacts / Projects

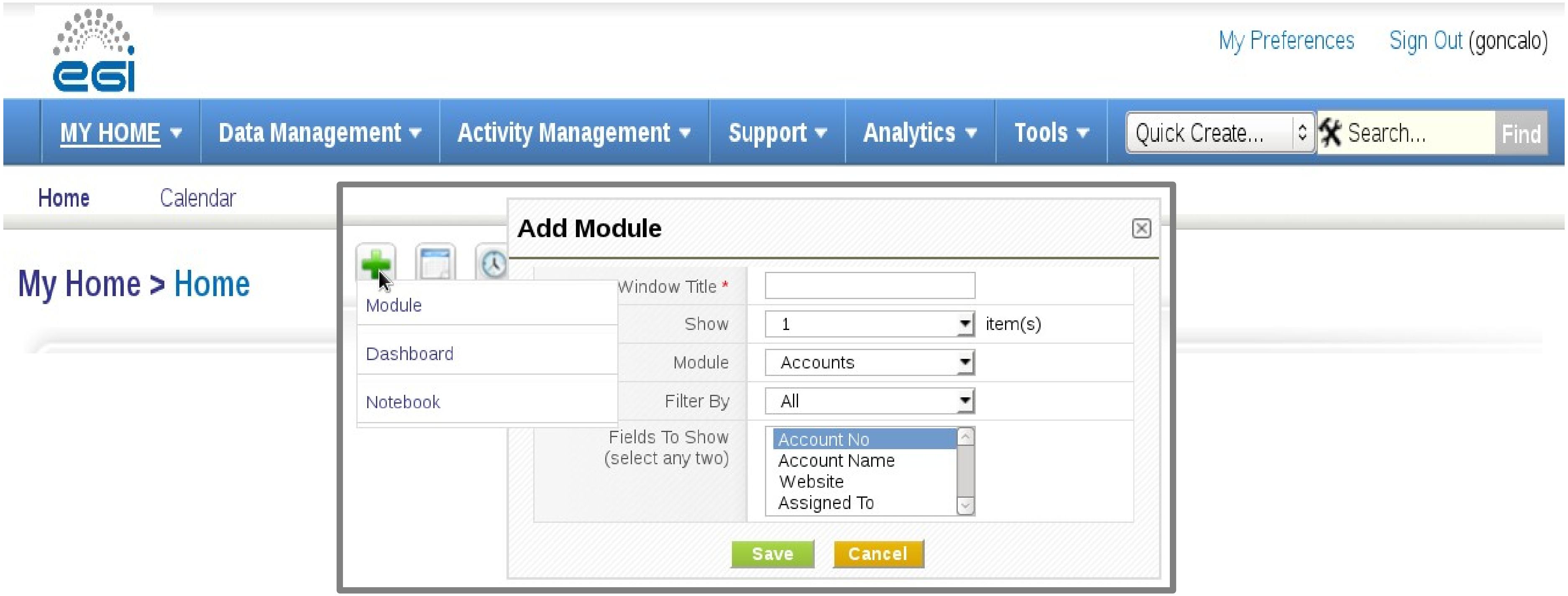
Documents

1 of 1

Select Documents | Add Document

Title	File Name	Modified Time	Assigned To	Folder Name	Action
None Included					

EGI CRM – My Home Page



- Add extra modules / functionalities
  - Define widgets layout
  - Add *Notebook, Module or Dashboard* widget

EGI CRM – My Home Page

- Define *My Home page* Components
  - Select *User Settings* and edit your user preferences
  - Select which *Home Page Components* you would like to be displayed in your *My Home* page

8. Home Page Components

Home Page Dashboard	Show	Hide
Top Accounts	Show	Hide
Top Potentials	Show	Hide
Top Quotes	Show	Hide
Key Metrics	Show	Hide
Top Trouble Tickets	Show	Hide
Upcoming & Pending Activities	Show	Hide
My Group Allocation	Show	Hide
Top Sales Orders	Show	Hide
Top Invoices	Show	Hide
My New Leads	Show	Hide
Top Purchase Orders	Show	Hide
My Recent FAQs	Show	Hide
Upcoming Activities	Show	Hide
Pending Activities	Show	Hide

3. EGI Use Cases

Record ESFRI data
NGI interactions
EGI.eu interactions

Use Case – Record ESFRI Data

1. ***Maintain and record information*** about ESFRI projects

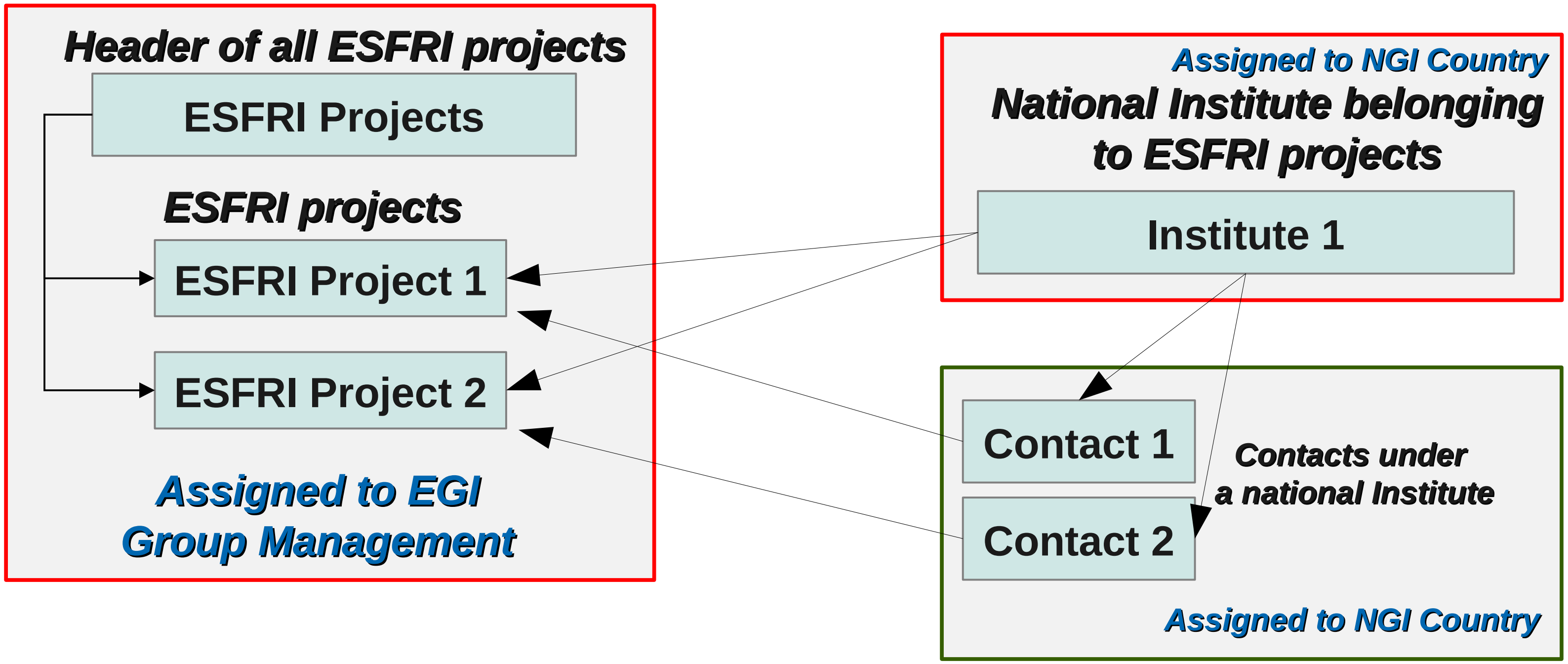
2. ***Maintain and record information*** about national ESFRI endpoints (institutes) and associated contacts

3. ***Track the progress*** concerning NGI attempts while approaching national ESFRI endpoints

4. NGIs should be able to ***insert and manage information*** **about a national ESFRI endpoints and its contacts**

Use Case – Record ESFRI Data

- Use ***Accounts*** to track ESFRI projects / endpoints information.
- Use ***Contacts*** to associate individuals persons to institutions
- Use ***Groups*** to set permissions



EGI CRM – Accounts data

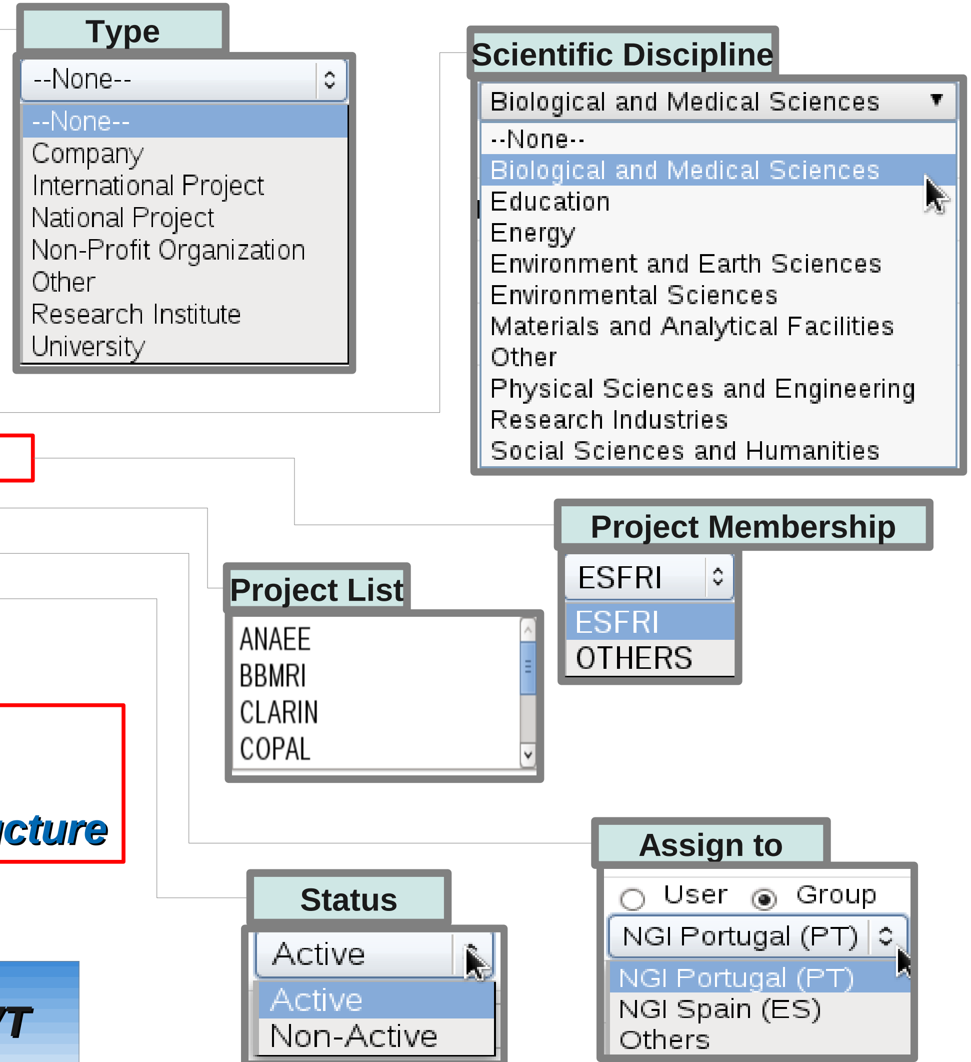
Account Information

- Account Name
- Account No
- Institution
- Website
- Email; Other Email
- Created Time
- Modified Time
- ***Type***
- ***Scientific discipline***
- ***Project Membership***
- ***Project List***
- ***Assigned to***
- ***Status***

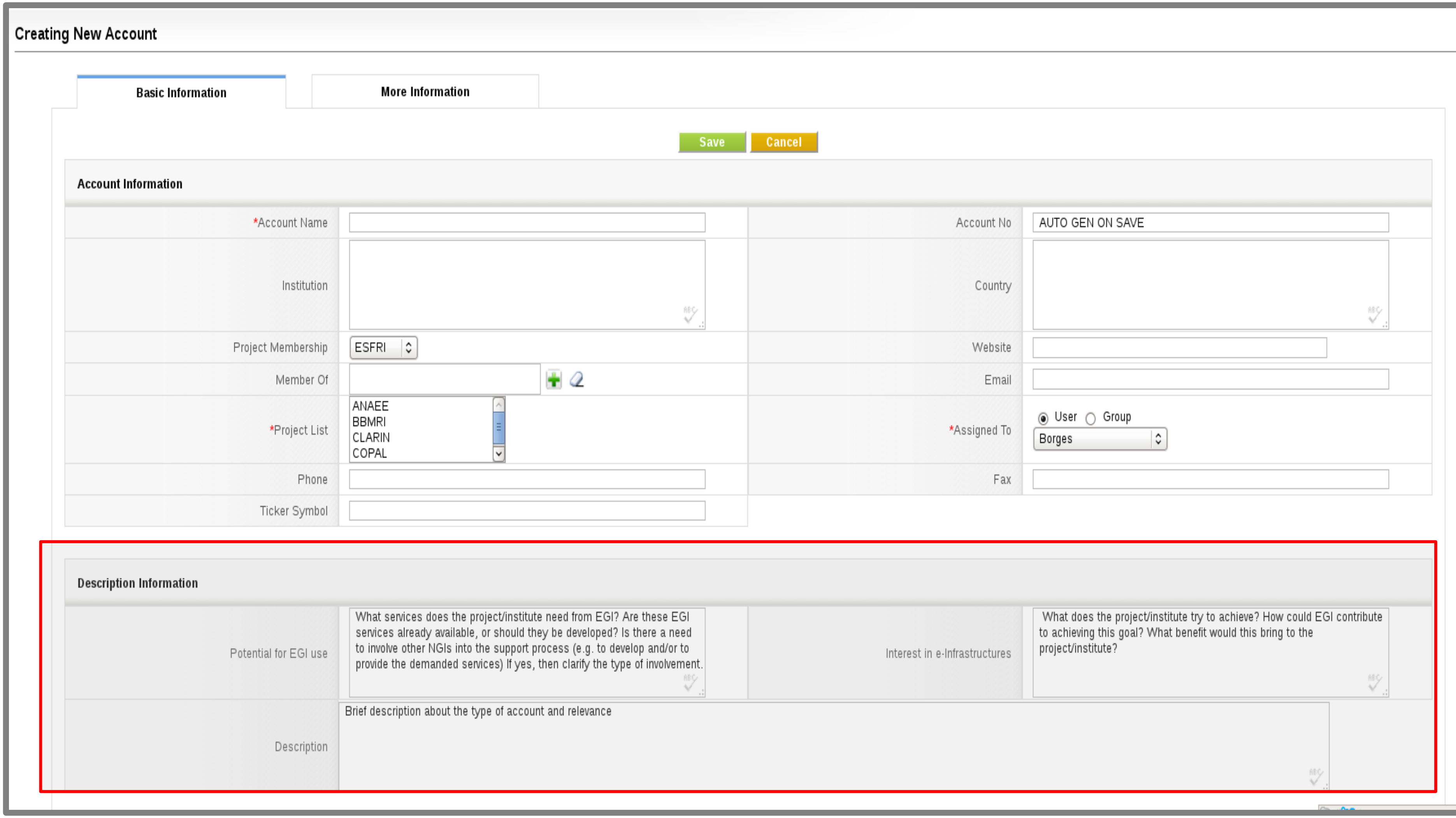
Description information

- ***Description***
- ***Potential for EGI use***
- ***Interest in e-infrastructure***

Input from the Intelligence Collection EGI VT



EGI CRM – Accounts data


Creating New Account

Basic Information | More Information

Save | Cancel

Account Information

*Account Name		Account No	AUTO GEN ON SAVE
Institution		Country	
Project Membership	ESFRI	Website	
Member Of		Email	
*Project List	ANAEE BBMRI CLARIN COPAL	*Assigned To	User Group Borges
Phone		Fax	
Ticker Symbol			

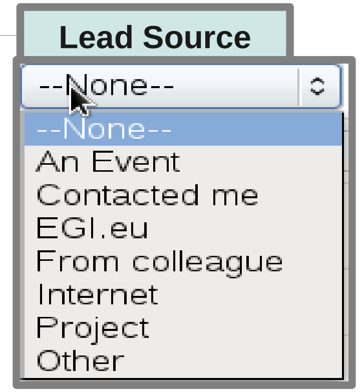
Description Information

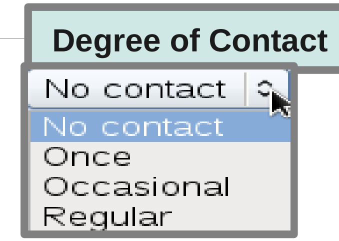
Potential for EGI use	What services does the project/institute need from EGI? Are these EGI services already available, or should they be developed? Is there a need to involve other NGIs into the support process (e.g. to develop and/or to provide the demanded services) If yes, then clarify the type of involvement.	Interest in e-Infrastructures	What does the project/institute try to achieve? How could EGI contribute to achieving this goal? What benefit would this bring to the project/institute?
Description	Brief description about the type of account and relevance		

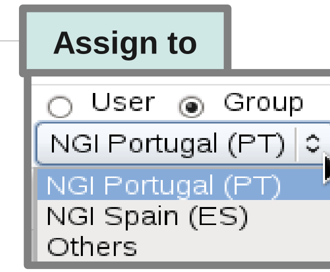
EGI CRM - Contacts data

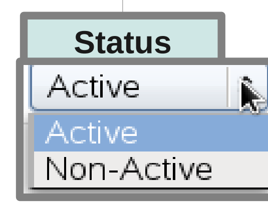
Contact Information

- First Name
- Last Name
- Mobile
- Title
- Email; Other Email
- Personal Web Page
- Contact ID
- *Account*
- Created Time
- Modified Time
- *Lead Source*
- *Degree of Contact*
- *Assigned to*
- *Status*
- *Project List*
- *Project membership*



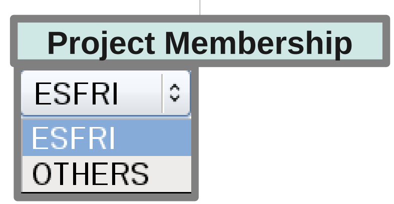


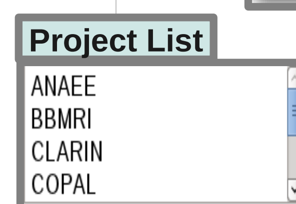




Description information

- Description





Use Case – NGI interactions

1. Record a new institute endpoint

- Select *Data Management → Accounts* and
- Important information to fill in
  - → *Project Membership:* Choose “ESFRI” or “Others”
  - → *Project List:* Choose the institution projects (one or more).
  - → *Assigned to:* Select your “NGI Country” group

2. Record a contact under the institute endpoint

- Select and *Data Management → Contacts* and
- Important information to fill
  - → *Account:* Choose the account for the contact.
  - → *Project List:* Choose the contacts projects (one or more).
  - → *Assigned to:* Select your “NGI Country” group

Use Case – NGI interactions

3. List ESFRI projects with a member institute from my country

- Select *Data Management →Accounts →Go to Advanced Search*
- Select Filters *List ESFRI endpoint per Country*
- Change first search condition: "*Country equals <Country>*"

4. List ESFRI endpoints assigned to my NGI

- Select *Data Management →Accounts →Go to Advanced Search*
- Select Filters *List ESFRI endpoint per Country*
- Change search condition to: "*Assign To contains NGI <Country>*"

5. List other projects with a member institute from my country

- Select *Data Management →Accounts →Go to Advanced Search*
- Select Filters *All*
- Change first conditions to "*Project Membership equals Other*"
- Add a second search condition: "*Country equals <Country>*"

Use Case – NGI interactions

6. List all projects with a member institute from my country but with no contacts associated

- Select *Analytics →Reports*
- Choose the report "*Accounts without Contacts*"
- Change the Country conditions to: "*Country equals <Country>*"
- *Hit Generate Now*

7. List all projects where there is a member institute from my country with valid contacts still not contacted

- Select *Analytics →Reports*
- Choose the report "*Accounts not contacted*"
- Change the Country conditions to: "*Country equals <Country>*"
- *Hit Generate Now*

Use Case – NGI interactions

8. Record the discussion I had with an ESFRI/non ESFRI project member

- Select *Data Management → Accounts / Contacts*
- Choose (or search for) the appropriate item.
- Select *More information* tab and expand the *Documents* section
- Select *Add Document*

9. *See the discussions (or a summary of discussions) that other NGIs had with their projects*

- Select *Tools → Documents*
- Choose (or search for) the appropriate item

or

- Select *Analytics → Reports*
- Choose the report "*Documents per Account / Contact*"

Use Case – EGI.eu interactions

1. List all ESFRI projects

- Select *Data Management →Accounts →Go to Advanced Search*
- Select Filters *List ESFRI Global Projects*

2. List ESFRI endpoints per country (or NGI)

- Select *Data Management →Accounts →Go to Advanced Search*
- Select Filter *List ESFRI endpoints per Country / NGI*

3. List non-ESFRIs endpoints per country (or NGI)

- Select *Data Management →Accounts →Go to Advanced Search*
- Select Filter *List non-ESFRI endpoints per Country / NGI*

Use Case – EGI.eu interactions

4. List project endpoints with no associated contacts

- Select *Analytics →Reports*
- Choose the report "*Accounts without contacts*"
- *Hit Generate Now*

5. List project endpoints with associated contacts not contacted

- Select *Analytics →Reports*
- Choose the report "*Accounts not contacted*"
- *Hit Generate Now*

6. List project endpoints created (modified) in last 30 days

- Select *Analytics →Reports*
- Choose the report "*New (Modified) Accounts (last 30 days)*"
- *Hit Generate Now*

Use Case – EGI.eu interactions

7. List contacts created (modified) in the last 30 days

- Select *Analytics →Reports*
- Choose the report "*New (Modified) Contacts (last 30 days)*"
- *Hit Generate Now*

8. List documents created in the last 30 days

- Select *Analytics →Reports*
- Choose the report "*New Documents (last 30 days)*"
- *Hit Generate Now*

9. Much more possible... please provide feedback about what kind of reports do you need...

- *(...)*

4. Final Considerations

EGI CRM – Extra functionalities

1. Audit Trails

– Only accessible to the administrator

– Who accessed What; When was it accessed; ...

2. Accounts and Contact data Export / Import using .csv files

– Only accessible to the administrator

– Important for mass changes in the data structures or to export data to some other tool

3. Workflows

– Ability to automate event creations, creation of Tickets, Contacts, Potentials, Project Tasks,..).

4. 'View History' of a record

– Timeline of changes made on a record: Which field is changed, by whom, and when while seeing its present and earlier values (needs some development).

EGI CRM – Unexplored modules / functionalities

1. Products

– Set and manage a catalogue of products

2. Campaigns:

– Marketing effort to increase number of clients or improve the awareness of a new product of the company.

3. Trouble Ticket (sometimes called Service Request):

– A CRM System, as well as many other Help Desk and Issue Tracking systems, use Trouble Tickets to capture, track, and manage, client issues or service requests

EGI CRM - Drawbacks

- ***Functional***
  – Unique templates for entities (Accounts, Contacts, Projects). Limits the possibility to define entities for many different scopes.
  – One project / task / milestone can not be associated to more than one Account / Contact

- ***Philosophical***
  – Accounts can have multiple Contacts but a Contact can not be associated to more than one “Account. This is an assumption from the commercial environments.
  – Email tracking assumes that all the staff works is under the same administrative domain. Users can check their email through the tool and qualify the emails they want to share with other users through CRM. Users have to allow access to their mail server (by imap) meaning that all their email would be accessible to the CRM tool.

EGI CRM - Conclusions

- ***EGI Use cases where successful implemented***
  – It is now time for the community to test how good the implementation fits to the use cases
- ***Very flexible (therefore complex) tool***
  – The vtiger CRM business model relies on selling support and customization.
- ***Drawbacks***
  – Assumptions coming from the commercial environment for which the tool was designed not adjusted to EGI environment
  – Tool not aimed to have internal staff from multiple administrative domains

EGI CRM – Next steps

- ***NILs / ESFRI Contact VT members can start using the system***
  – Insert new *Accounts* and *Contacts*.
  – Capture interviews / notes in *Documents*.
  – Generate your own *Reports*
  – Explore the *Calendar (Events and ToDos).*
  – Configure the tools to your needs; play around!!!
  – Deadline to test the system ?!

  – Provide suggestions and feedback (to the data model, to the functionalities, ...). Report issues to *egicrm.helpdesk@lip.pt.*
  – Deadline to provide feedback ?!

  – More development / customization time is needed after your experience with the service. Should depend on the amount of suggestions and their complexity.