

EGI “Client” Relationship Management Tool

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- **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
- EGI-InSpire **needs an optimised management of relationships between EGI.eu, NGIs and their potential user leads** because:
 - EGI partners and their/our “clients” are distributed
 - Conversations with “clients” happen at different places, context and time and EGI partners should share that information
 - EGI needs to construct a portfolio of prospective clients and explore the opportunities

- **Who are the EGI “clients”?**

- All user communities that may be interested in using our infrastructure and services

- **What do we want to record?**

- Big user communities are organized under the umbrella of projects (ESFRI, National, Others) working as frontends for the community

- We want to know which projects are out there to which person to talk while approaching those projects

- We want to know which research institutions are working in which project which researchers to talk

- **Who will record information?**

- EGI.eu and NGI staff (NILs). Both will be the users of the system

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, ...

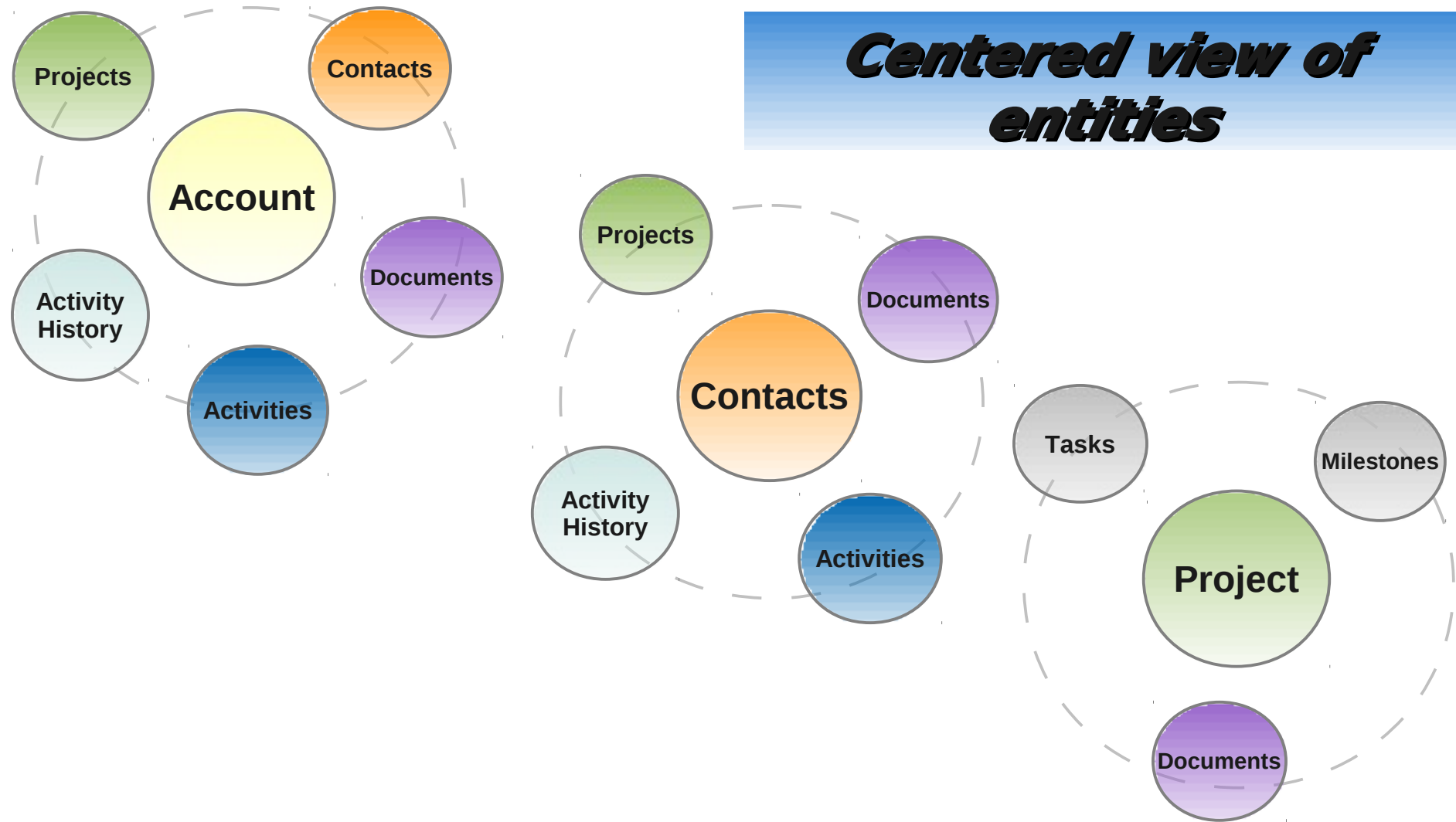
Project

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

Centered view of entities



CRM Basics – Relations

- Use **Accounts** to record Projects and Research Institutions

ESFRI projects

P1

National projects

P1'

Other International Projects

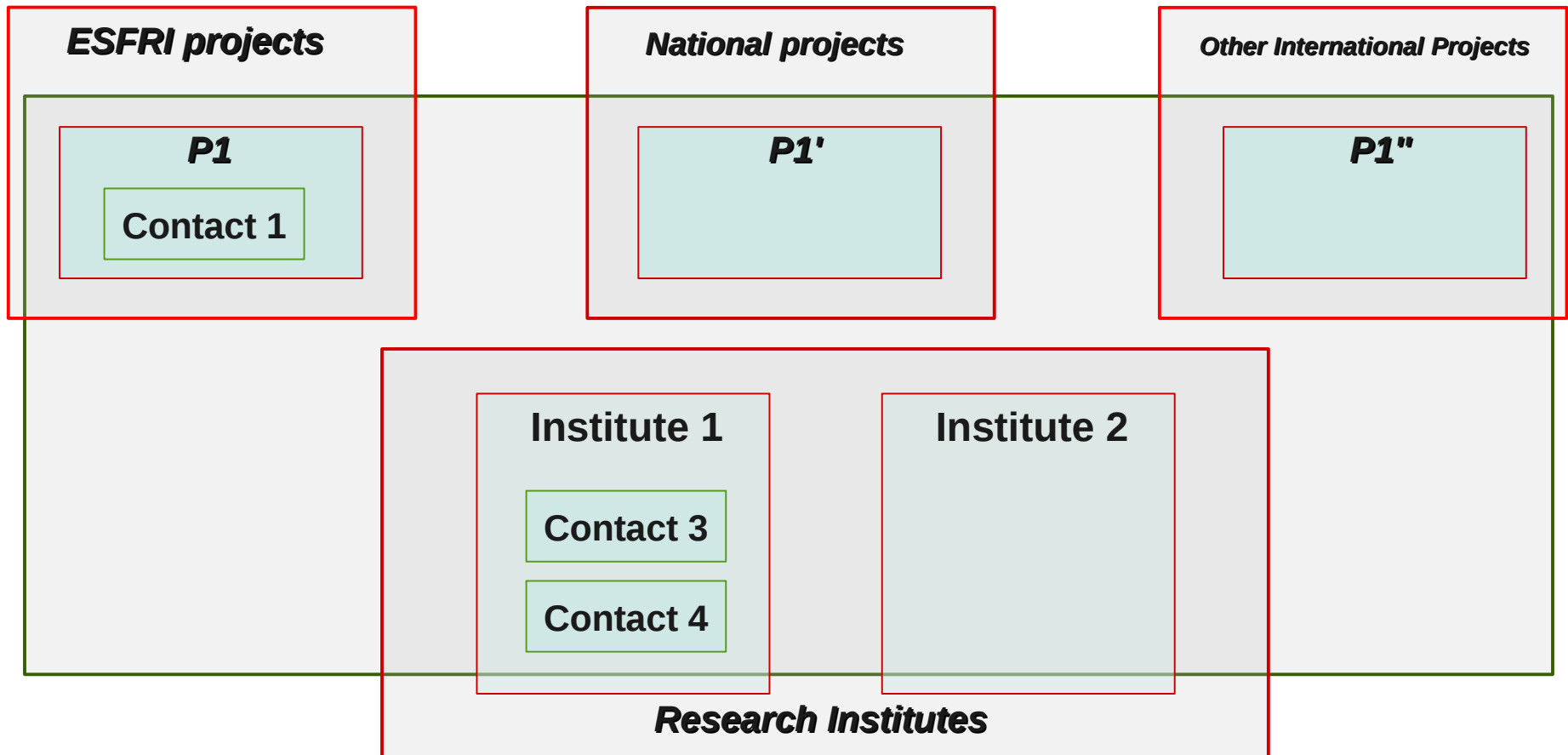
P1''

Institute 1

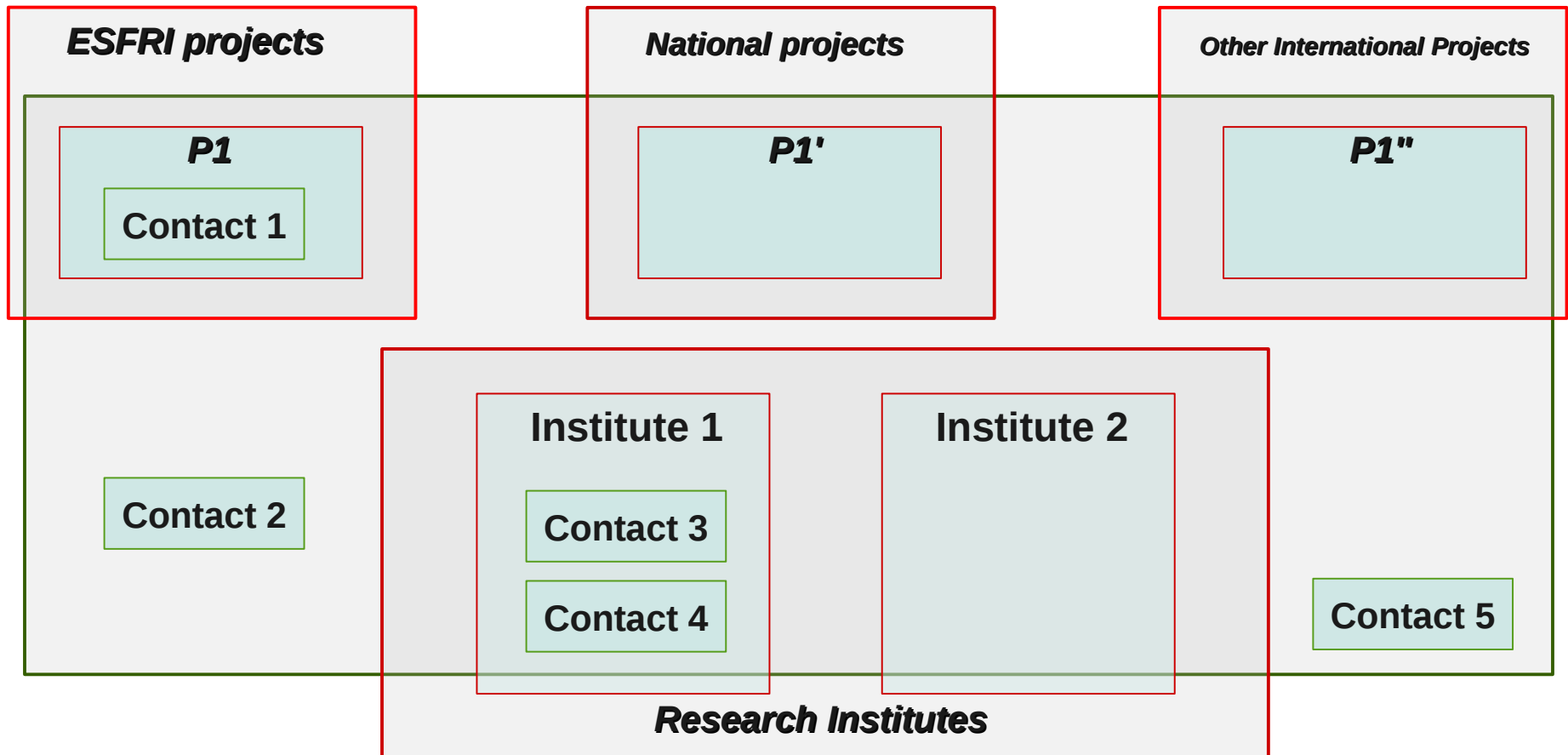
Institute 2

Research Institutes

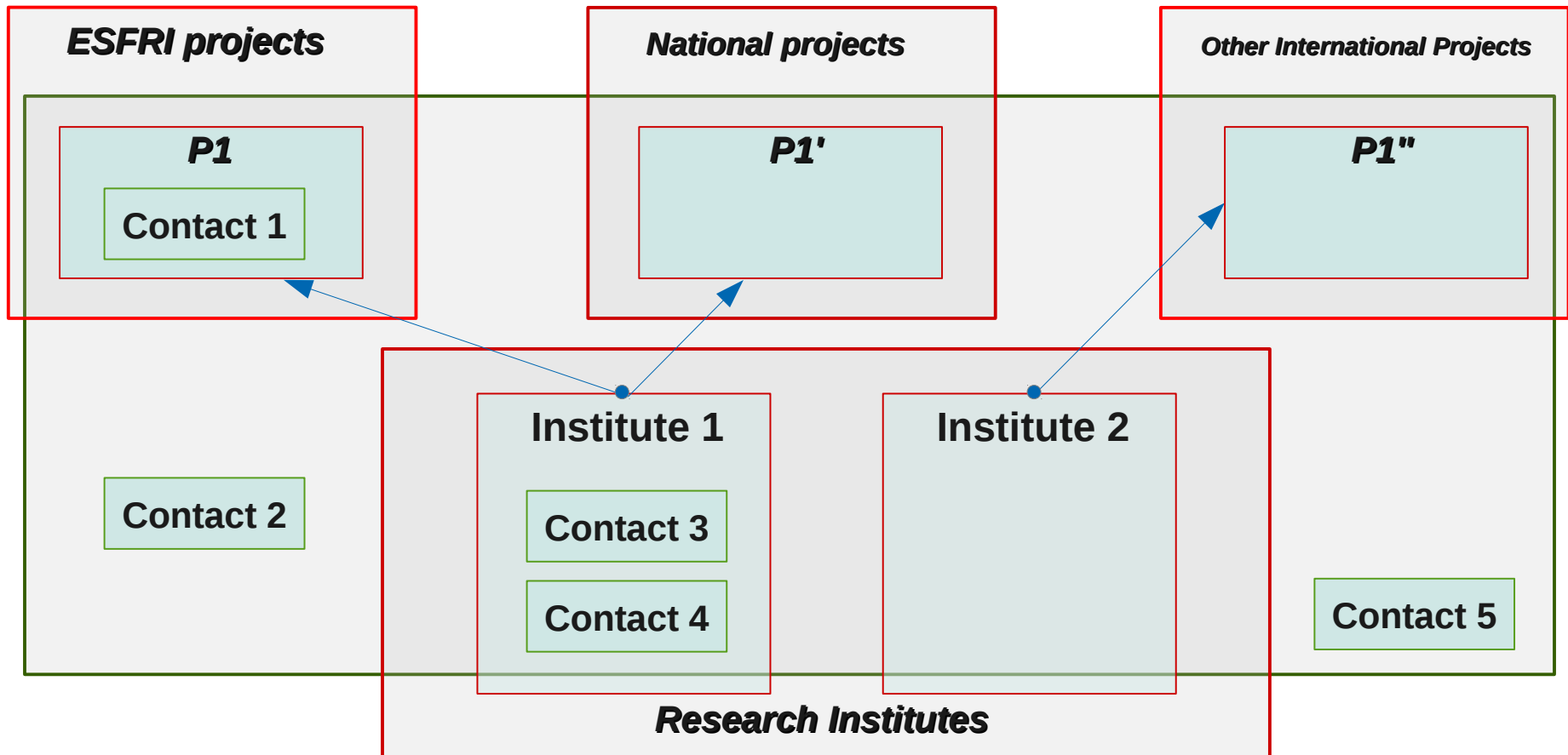
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- Use **Contacts** to record individuals persons



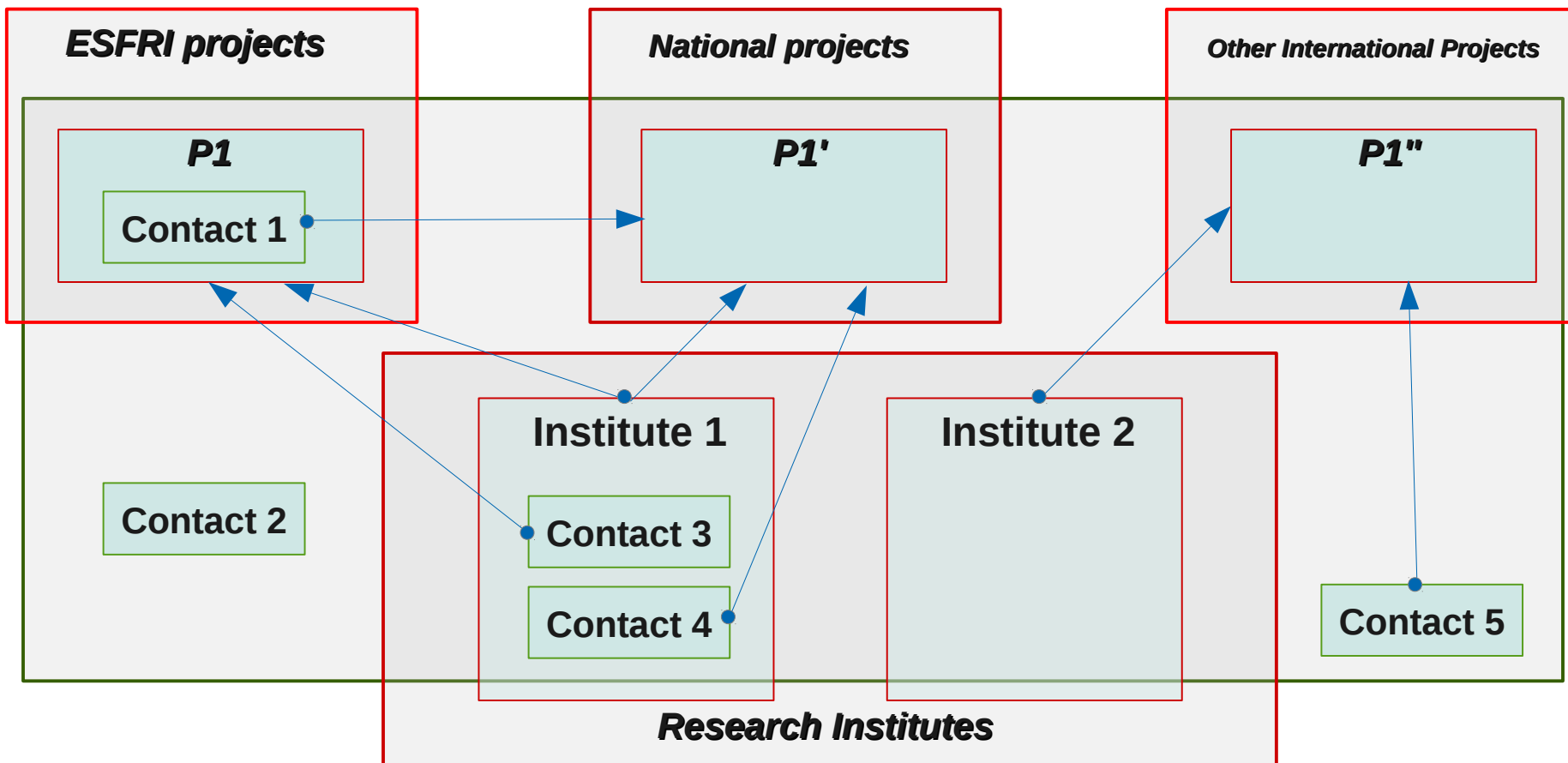
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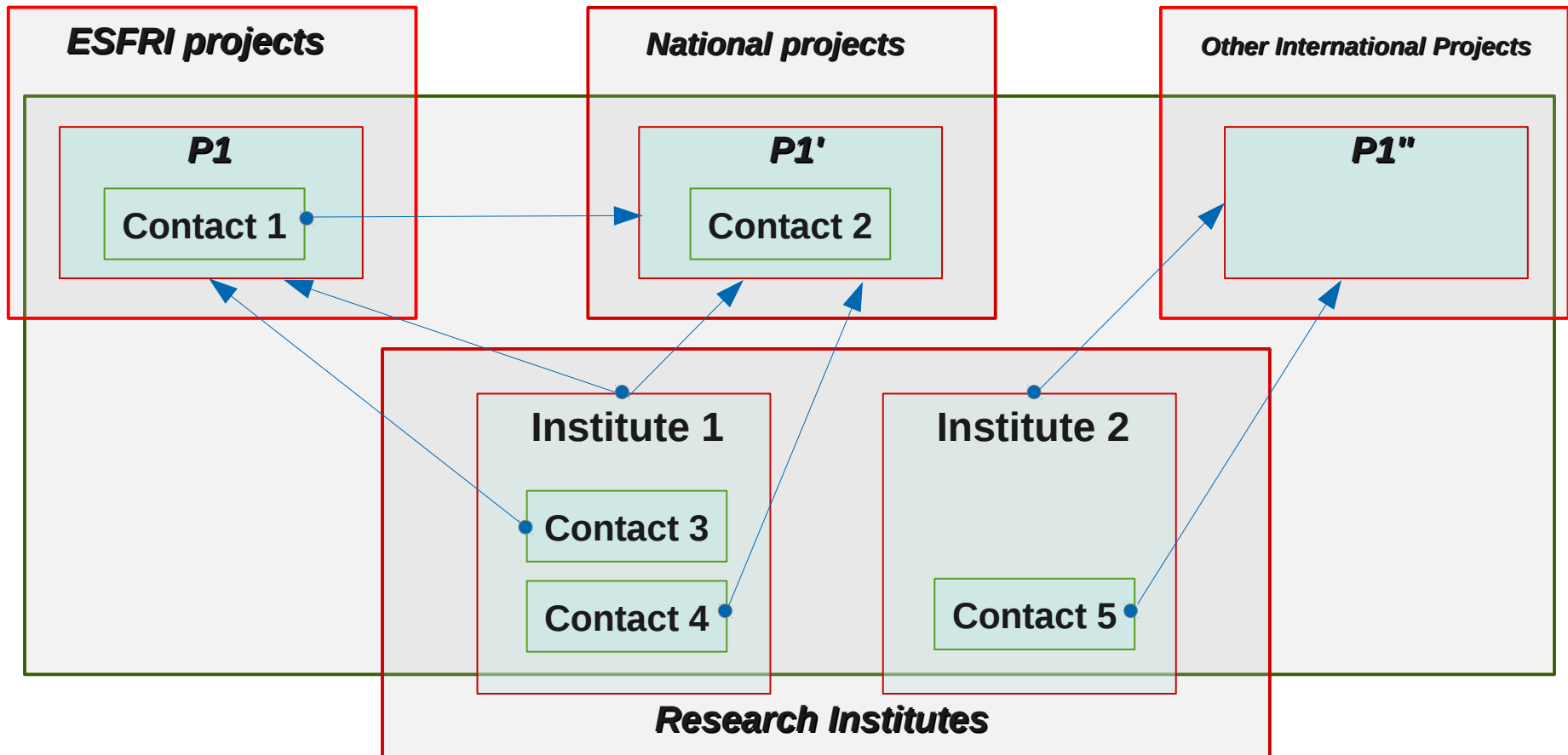
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- Use **Contacts** to record individuals persons
- Use **Project List Attribute** to link Contacts and Research Institutions to Projects



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- **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
- NILs request will be implemented
- egicrm.helpdesk@lip.pt



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

- **Documentation endpoint**
 - <https://wiki.egi.eu/wiki/CRM>
- **Detailed information (in progress)**
 - Usability of the Tool
 - Clarification of the use cases
 - Account and Contact creation procedure
 - Generation of reports
 - Customization of tool environment (creation of filters, creation of reports)

Account Information

More Information

Account Information

Account Name	European Extremely Large Telescope	Account No	ACC7
Account Acronym	E-ELT	Status	Active
Country	Abkhazia	Website	http://www.eso.org/sci/facilities/eelt/
Email		Account Type	ESFRI Project
Project List	ESFRI:E-ELT	Scientific Discipline	Physical Sciences and Engineering
Assigned To	EGI Group Management	Modified Time	21-03-2012 10:46:25
Created Time	20-03-2012 17:40:16	Start Date	01-01-2013
End Date	01-01-2021		

Description Information

Potential for EGI use	Interest in e-Infrastructures
Description	

Comments Information

Show: All v

Contact Information

[More Information](#)

▼ **Contact Information**

First Name	B. Parodi	Contact Id	CON5
Last Name	P. Romano	Account Name	Istituto Nazionale Per La Ricerca Sul Cancro
Personal web page		Lead Source	Contacted me
Role	Researcher	Email	
Project List	ESFRI:BBMRI	Assigned To	NGI Italy (IT)
Degree of Contact	Occasional	Contact Status	Active
Created Time	21-03-2012 16:01:27	Modified Time	22-03-2012 17:09:58

▼ **Custom Information**

Potential for EGI use	Interest in e-Infrastructures
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▼ **Description Information**

Description	
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▼ **Comments Information**

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- **Clarification about the CRM entities and use cases**
 - This presentation; Tutorials Wiki; ...
- **Improvement of the web interface**
 - Clearer web forms
 - Removal of redundant attributes / fields
- **Automation tasks**
 - Implementation of background workflows
 - Validation of information (via JavaScript)

- **Actions to be performed**

- 1) Search information about Accounts and Contacts assigned to you NGL. Check, correct and complete !!!

- 2) Search for Accounts without Contacts. Fill the gaps !!!

- 3) If there are projects where you know research institutes in your region are working on, create a new Account for it.

- 4) If there are research institutes in your region that are not inserted in the system, create a new Account for it.

- 5) If there are important persons that we all should be aware, create a new Contact, and if possible, associate it to the correct account.

- **Doubts:** egicrm.helpdesk@lip.pt