D1.4 Structure to manage acquired industry contacts

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PP	Restricted to other programme participants (including the Commission Services)	
RE	Restricted to a group specified by the consortium (including Commission Services)	
CO	Confidential, only for members of the consortium (including Commission Services)	

Document History

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1 Introduction

This deliverable describes the actions related to the choice and implementation of the CRM (Customer Relationship Management) system, used at the SOLARIS Centre in order to manage industry contacts of the Industry Liaison Office. The work presented here corresponds to Task 1.1 and is intended to provide a basis for the future growth of the Industry Liaison Office, as well as ensure its sustainability. Proper management of the industry contacts, clear positioning of the contacts at the service pipeline, as well as understanding their technological problems, matching them to the available techniques, and properly introducing this information into the system, are crucial for long-term expansion and sustainability of the industrial services at SOLARIS.

Customer Relationship Management (CRM) systems are intended to support the processes centered around interactions with the customers of an organization. While in the early phases of development, traditional tools, such as spreadsheets or text documents can be sufficient to manage a limited number of contacts, associated challenges and limitations increase rapidly with the growing number of potential customers. This means that the implementation of the software is highly desirable, in order to increase the efficiency of the operations. Additionally, software systems make it easier to operate in growing teams, by simply adding new users to the interface, instead of lengthy onboarding processes. Standardization of relations management also minimizes the dependency on the specific people in the organization and the systems used by them.

In general, there are two models of CRM software systems. In the first one, the software is implemented on a local server and requires specialist IT knowledge for operation and maintenance. The second model is based on the Software-as-a-Service (SaaS) concept, wherein the system is operated in the cloud and accessed via a web-interface, or an Application Programming Interface (API). The first model offers a high degree of flexibility and control over the system parameters. However, it requires a lot of resources and its maintenance, required for example to install security upgrades and respond to the associated risks, scaling, or any required modifications can be costly and time-consuming. On the other hand, SaaS model in general operates only on the pre-defined systems which might not be sufficient for all organizations. However, the actual software implementation is effectively outsorced, there is

no need for local servers and all necessary updates, patches and security-related modifications are introduced automatically. Therefore, in recent years, it became a preferred model especially for small and medium-sized organizations. Additional advantages of SaaS-based CRM systems include: easy addition of new users, translating into easy scaling of the whole system, advanced graphical interfaces and analytical modules, a large library of additional add-ons and advanced modules, which can be added to the system depending on the requirements of the organization, low implementation and operation cost, high security, due to the rapid, automatic implementation of any security patches and effective support. Due to those factors, a decision was made to implement a CRM system in the SaaS model, based on the monthly subscription fee, which could be easily scaled depending on the needs of the Industry Liaison Office at SOLARIS.

Industry Liaison Officer at SOLARIS has tested several CRM systems, which is possible thanks to the free trial periods available in most cases, and assessed their functionalities, user-friendliness, analytical modules, graphical interfaces and the libraries of add-ons possible to implement. The tested systems include: Freshworks, SalesForce, Pipedrive, Zoho, noCRM, Capsule CRM. Industry Liaison Officer has also conducted discussions with project partners, especially the representatives of the Industrial Liaison Office at the Alba synchrotron, as well as different potential users of the systems. Based on the assessment and the following discussions, a decision was made to implement the Pipedrive CRM system, due to: (1) user-friendliness and ease of implementation, (2) advanced graphical interface, including the user-friendly pipeline view of the potential sales of services, (3) system of "activities", associated to the potential sales, which can be easily assigned to specific employees in the Directly Responsible Individual model, (4) high-rated mobile applications for both iOS and Android devices, (5) marketplace integrations, (6) availability of advanced analytical modules, (7) 24/7 support, (8) low price per user, starting at 15 EUR/month in the basic plan and (9) location of the data center within the European Union (in Estonia).

The implementation of the software has begun and is described in the following sections. Due to the choice of SaaS model, the system can be easily adapted to the changing requirements of the Industry Liaison Office at SOLARIS and changes, such as increasing the number of users of the system or subscribing to additional analytical modules, are expected in the future.

2 Software specification

Pipedrive CRM system has been implemented in the Essential version (https://www.pipedrive.com/en/pricing). This version was chosen as the most suitable and cost-effective for the early development stage of the Industry Liaison Office. Below a list of selected features/specifications of the Essential version of Pipedrive CRM system can be found:

- Lead and deal management (max. 3000 open deals);
- Customizable, multiple sales pipelines with an interactive graphical interface;
- Pre-defined, customizable products catalog;
- Custom database fields (max. 30 per company);
- Leads inbox;
- Deal rotting featire (notifications on the idle deals);
- Data import and export in most popular formats;
- Automatic cleaning of data via duplicate merging;
- Contacts and organizations database;
- File attachements associated with certain contacts/organizations/deals;
- Actions, associated to specific deals and system users, with a notification system;
- Limited e-mail integration (linking e-mails with specific deals using bcc);
- Deal and activity reports and visual dashboards;
- Company and user goals;
- Two-factor authentication;
- Dashboard view, sharable with individuals also outside the Pipedrive system;
- User permission sets (limited to 2);
- Visibility options across users (limited);
- Native mobile application for both iOS and Android, with real-time synchronization;
- Availability of various currencies and interface languages (including Polish);
- Open API interface.

An upgrade to higher subscription plans will be considered after the initial period. The most important additional features to consider, in case of an upgrade, are:

- Full e-mail synchronization (two-way);
- Customizable e-mail templates and signatures;
- Group e-mailing;
- E-mail, meeting and video-call scheduling;
- Contacts timeline view;
- Document integration (sales documents within the system, e-signature integration);
- OneDrive document integration;
- Workflow automation;
- Revenue forcast reports;
- Team management options.

A decision, with regard to the potential upgrade will be made in early 2023, based on the experiences of the Industrial Liaison Officer in working with the Essential version of the system, and the pace of the development of the Industry Liaison Office.

3 Implementation of the system

The system has been implemented with an initial set of contacts, made by the Industry Liaison Officer, and the potential deals, at the different stages of the service pipeline. In this section, several screenshots of the system are provided. Some of the information was anonymized due to the non-disclosure agreements (NDAs) or confidential-disclosure agreements (CDAs) signed with the potential customers of SOLARIS, or the GDPR regulations.

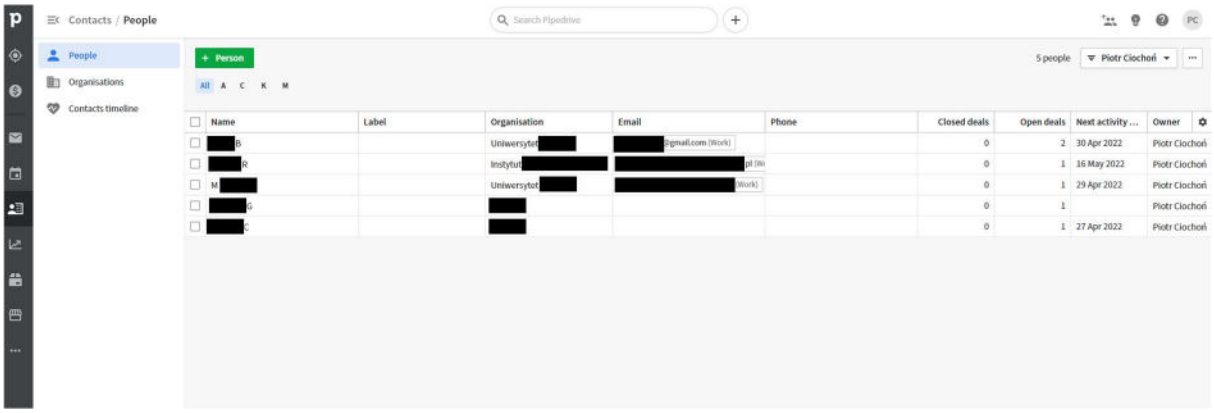

Figure 1: A screenshot of the Contacts view in the Pipedrive system

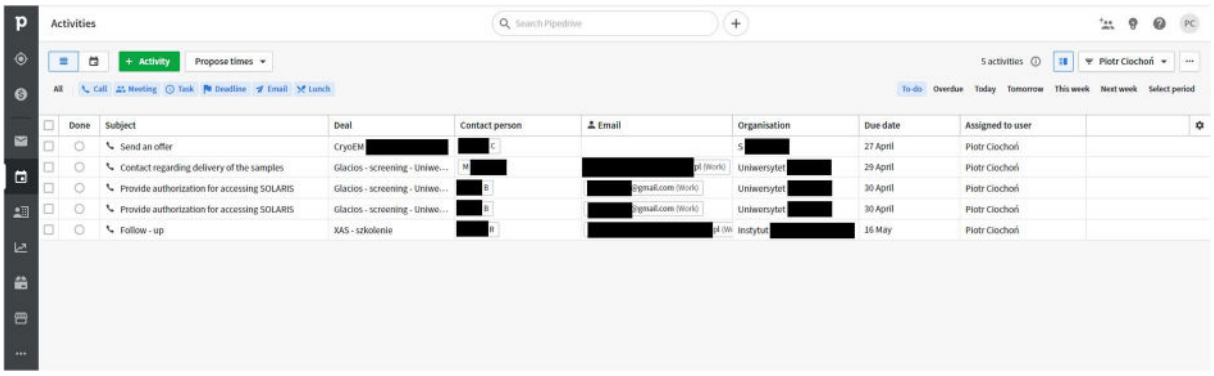

Figure *2*: A screenshot of the Actions view in the Pipedrive system

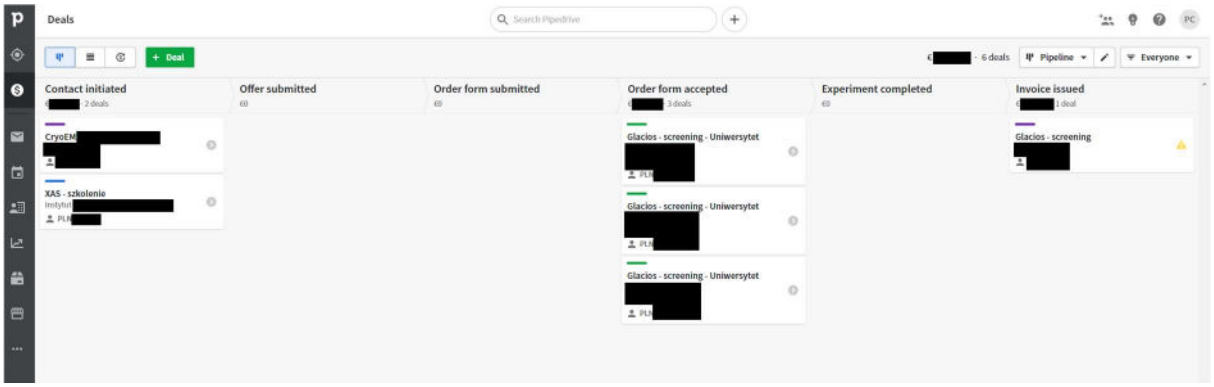

Figure *2*: A screenshot of the Deals view in the Pipedrive system