CRM TOOL

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CRM tool

A **Customer Relationship Management platform (CRM)**, a system that helps us manage interactions with current and potential partners.

Essentially, it's a central location to store contact, project and mission data, track interactions, and improve relationships which can lead to an overall mission growth.

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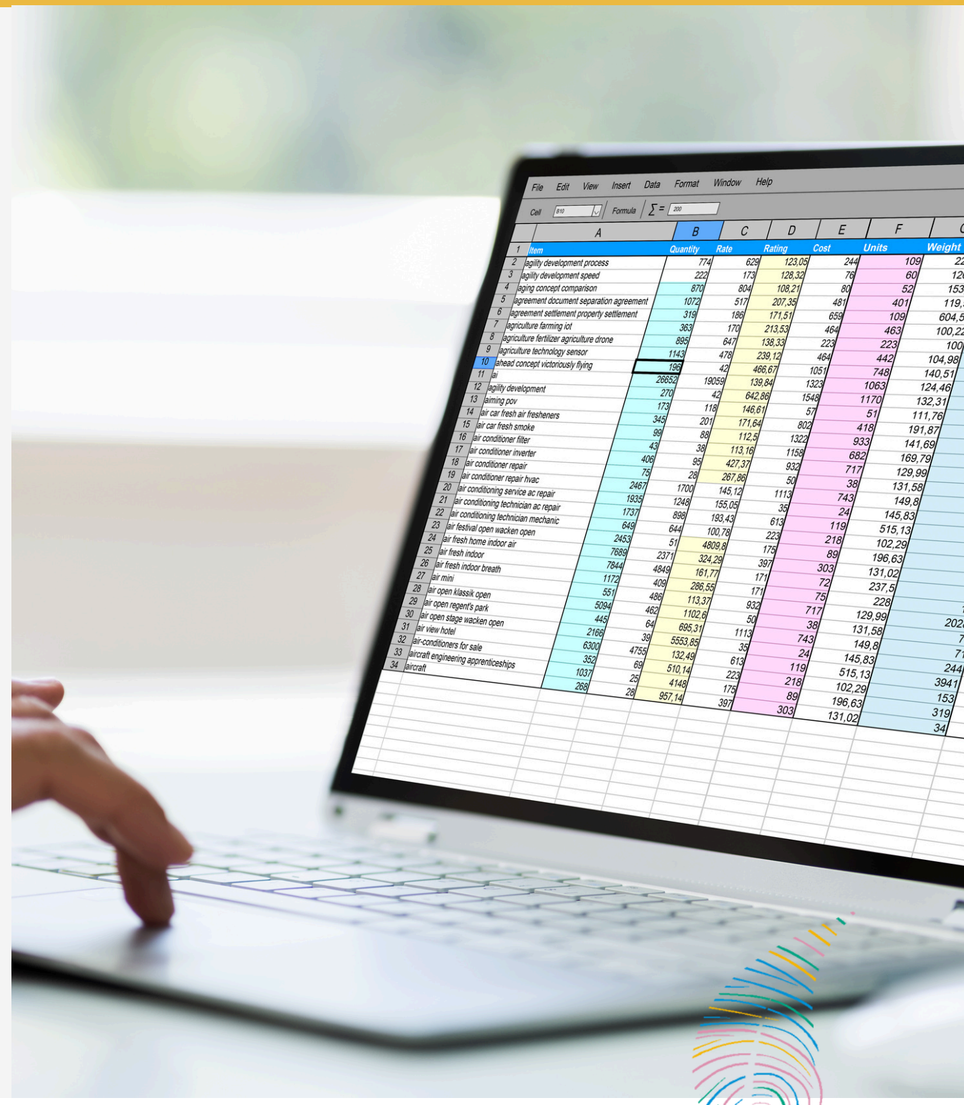
What we have

Currently

Spreadsheets

- No way to get any meaningful insight on how are our partners interacting with the various, simultaneous project activities.
- The information is decentralised, spreaded out through many files, not providing a clear visualisation on how our partners and contacts are interacting with each others.
- Because of the complexity of the distribution of these files, it is not maintainable.



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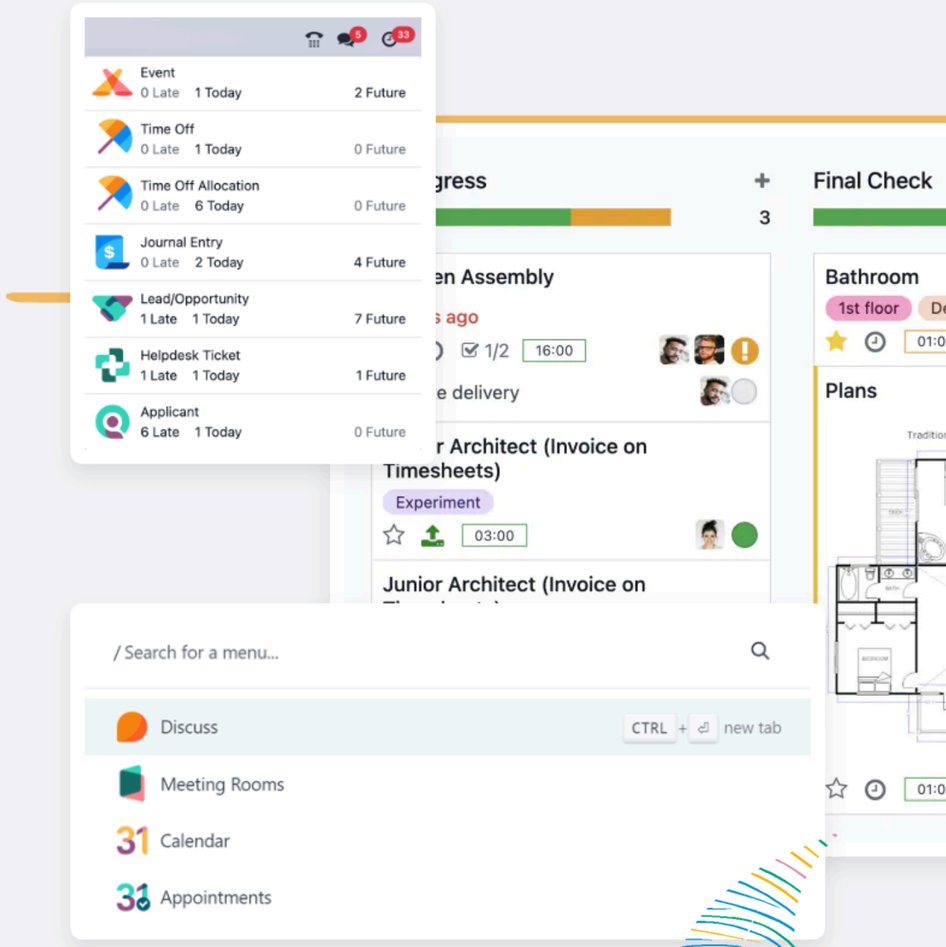
What we have

Market alternatives

Odoo and ERPNext

- Business oriented CRM, very focused on managing customers. They provide a very good insight and Sales pipeline management, tracking the progress of a customer from starting as a lead, throughout of turning it into a sale, including all the interactions, issues, support.
- They are very tight coupled to the idea of a business orientation process which does not fit our necessities.



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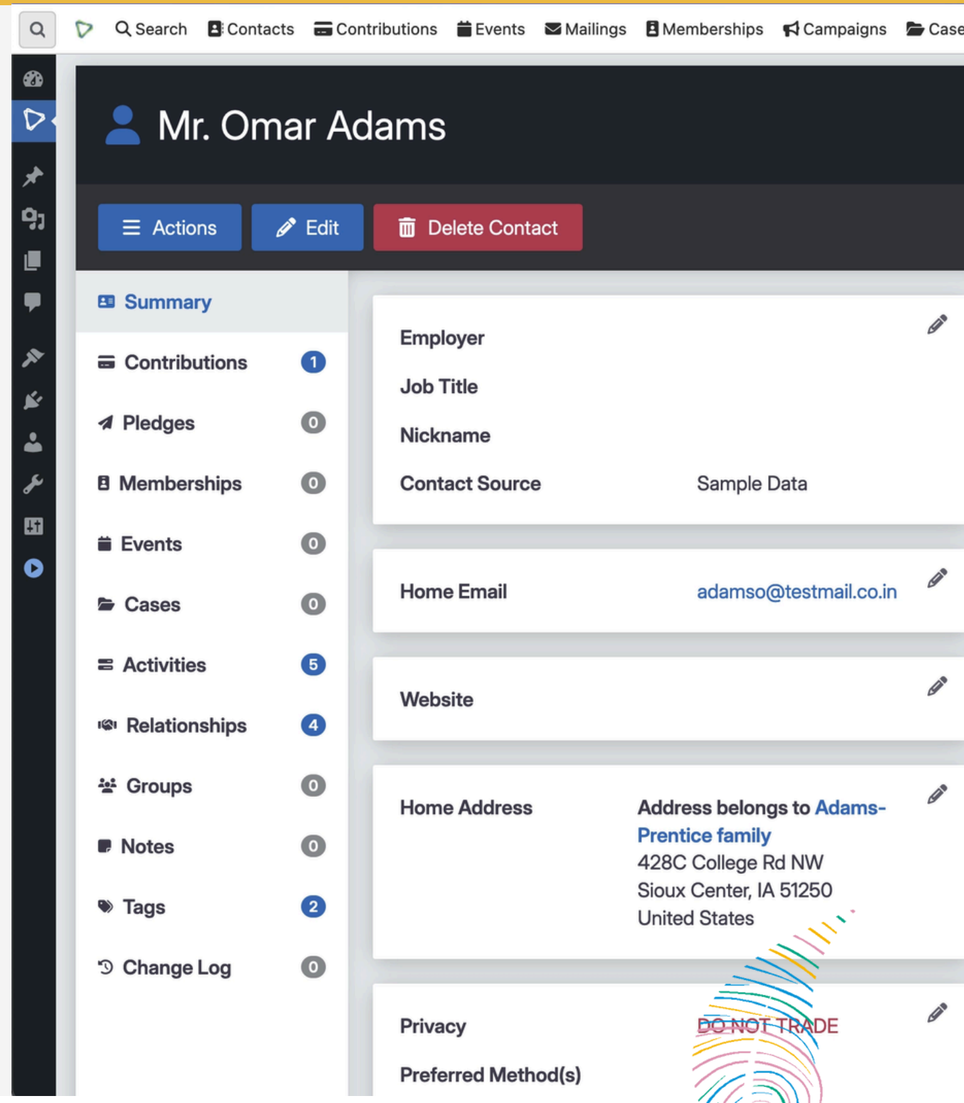
What we have

Market alternatives

CiviCRM

- Non profit oriented CRM, a more fitting solution to our problem, with many of the features we've identified as required. It has a focus on fund raising, membership payments and advocacy campaigns. The downsides of it would be the maintainability required in order to adapt it it to our needs, and keep it's compatibility and integration over the future.



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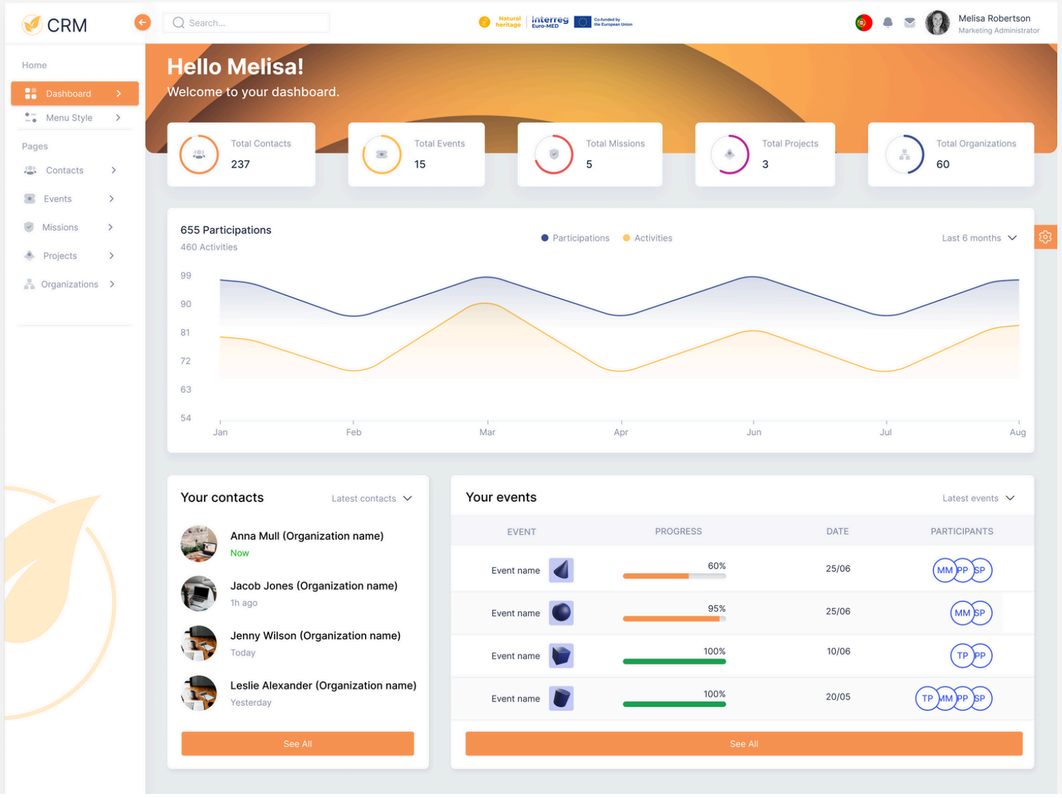
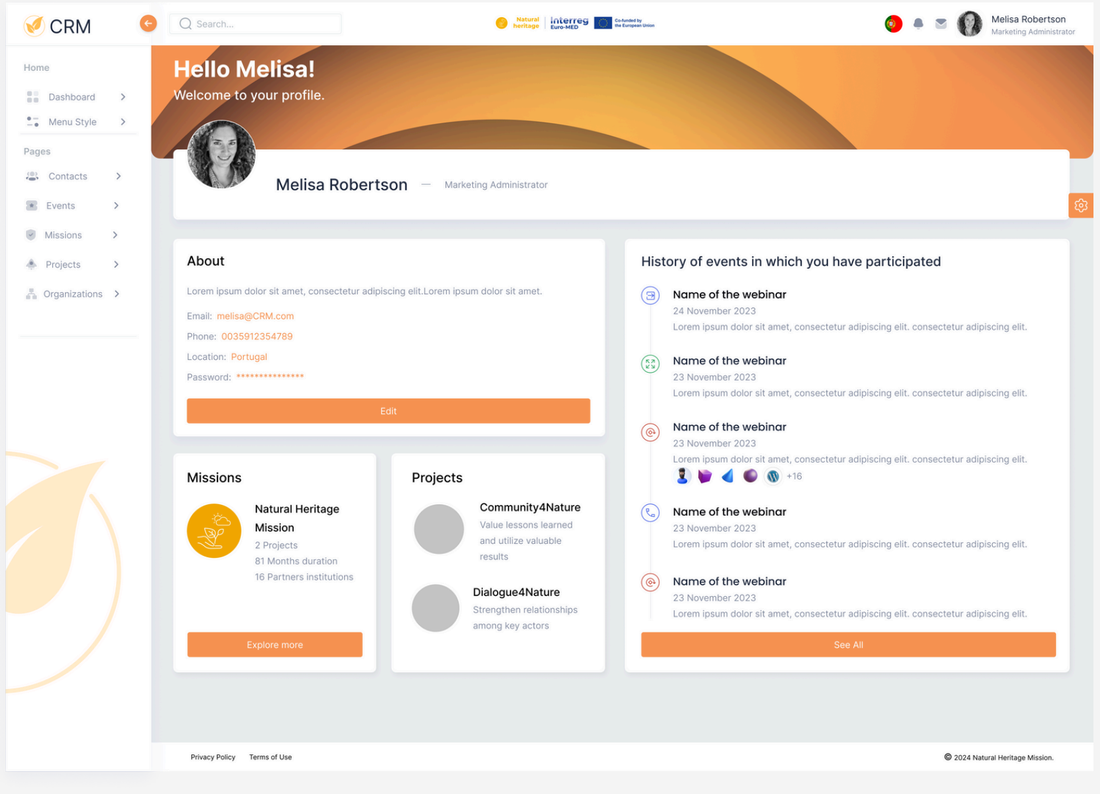
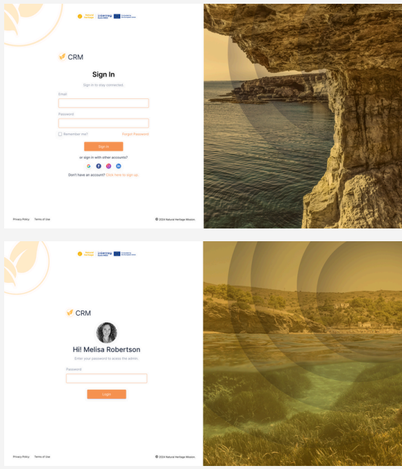
What we want to achieve







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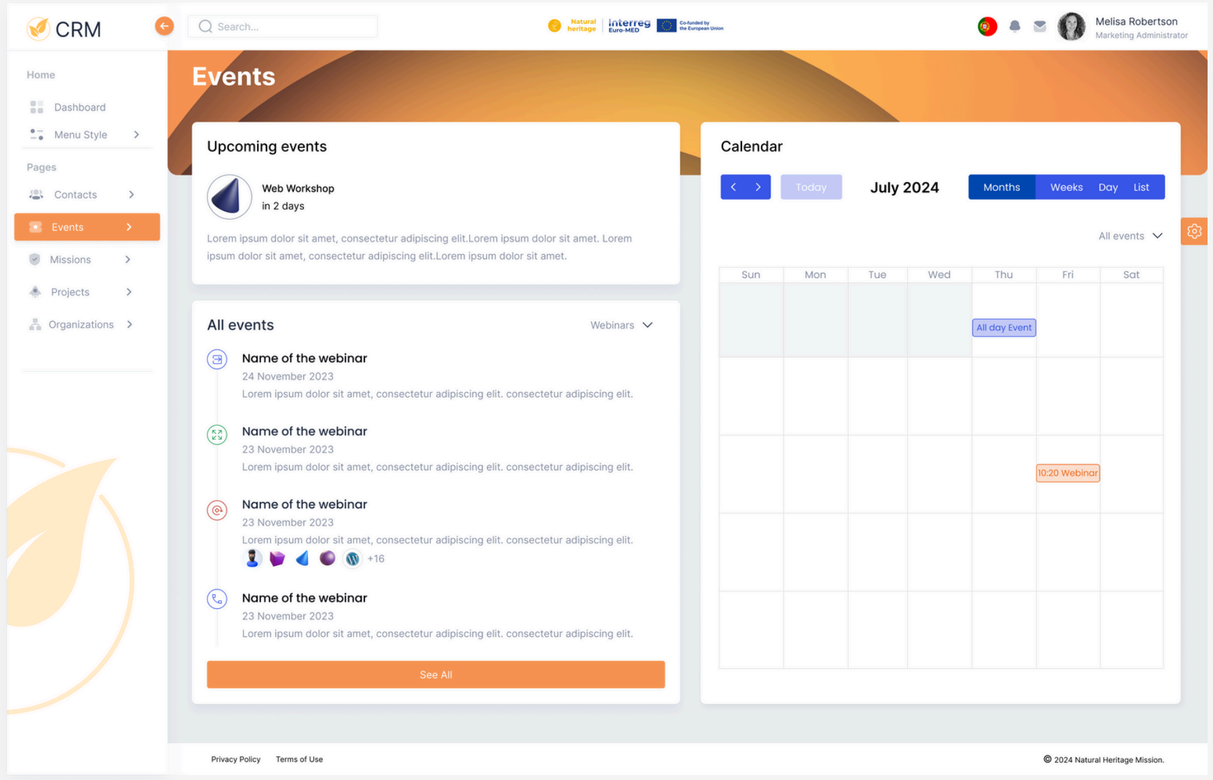

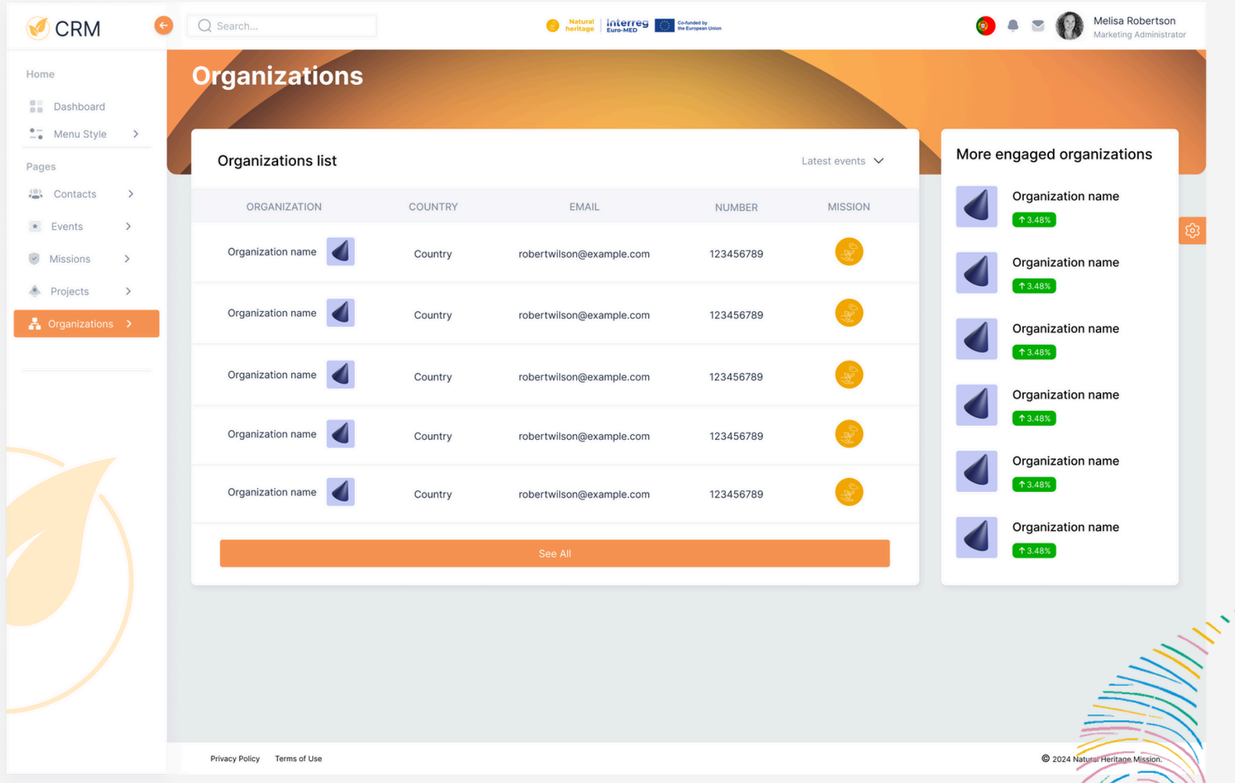

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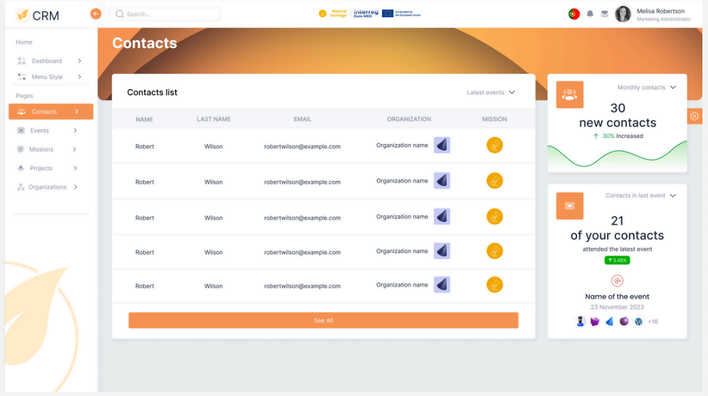
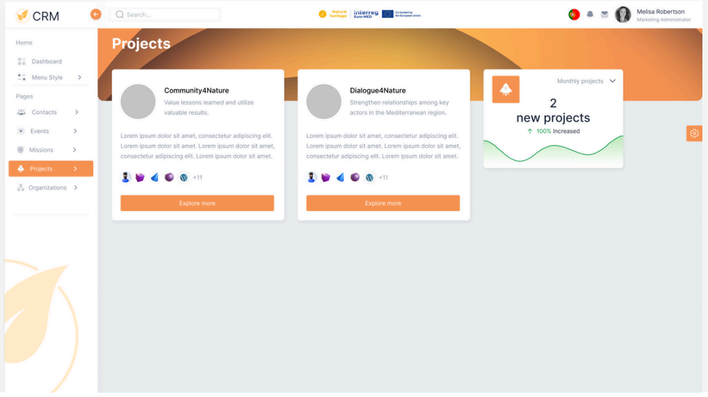
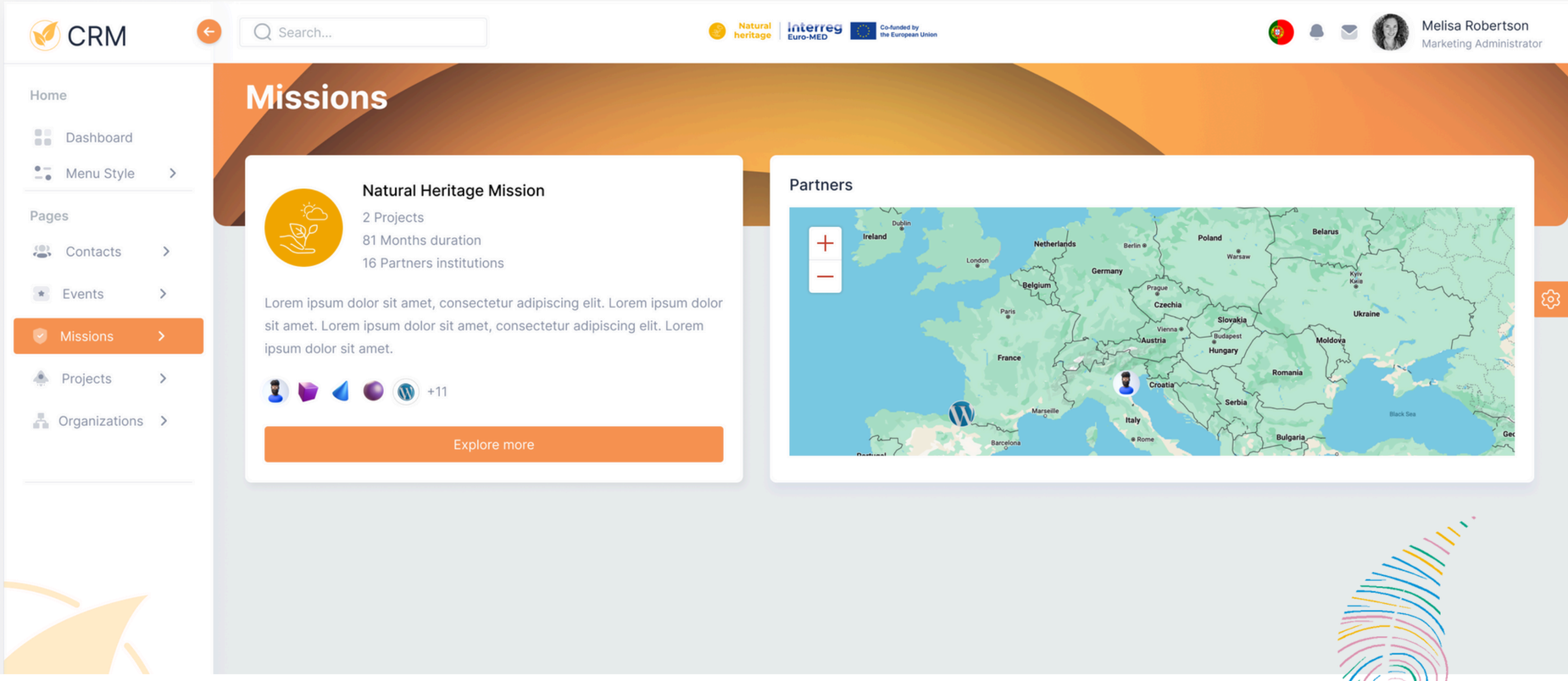
What we want to achieve







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Registration

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