



CRM TOOL



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**Interreg
Euro-MED**



**Co-funded by
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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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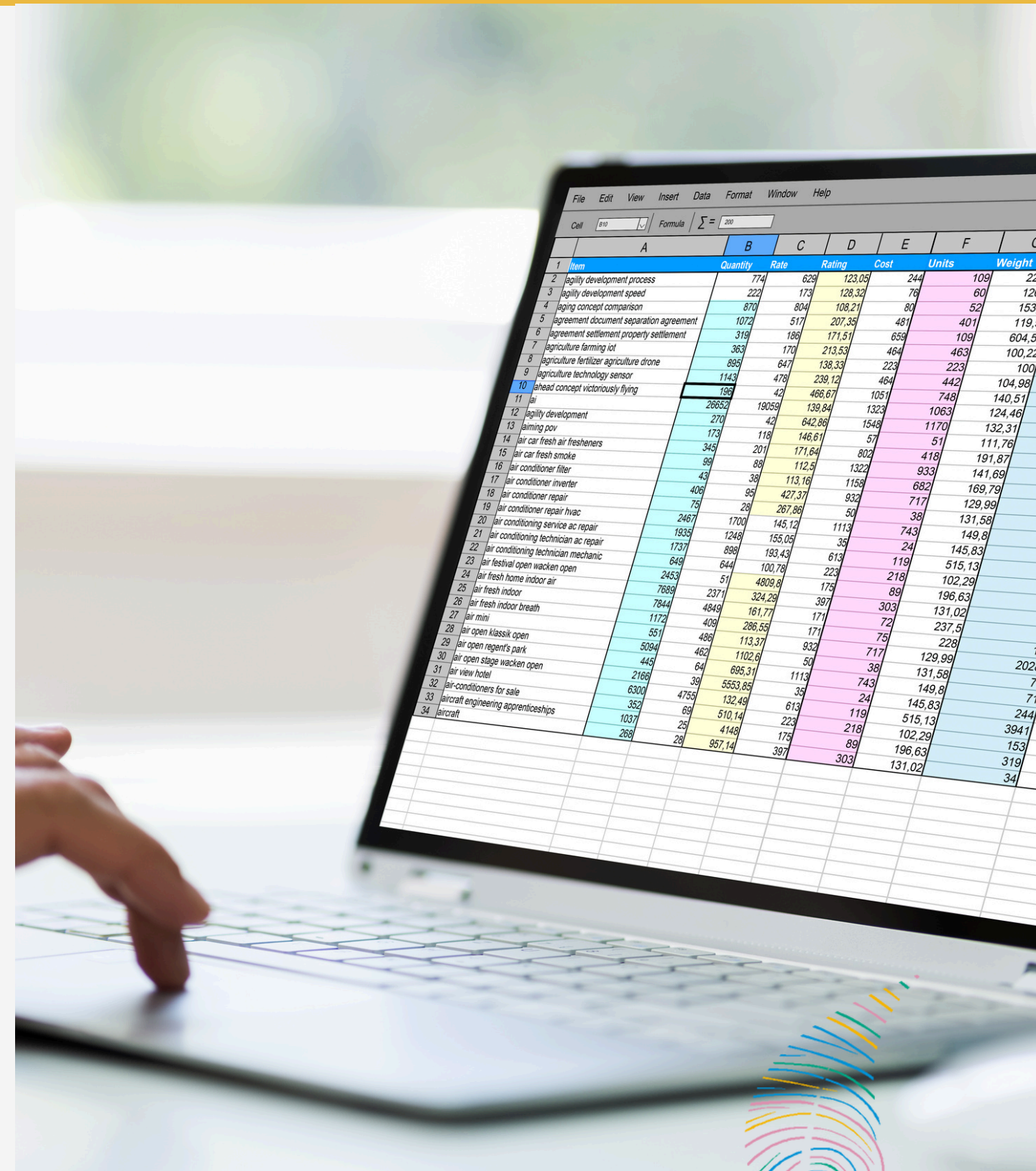


What we have

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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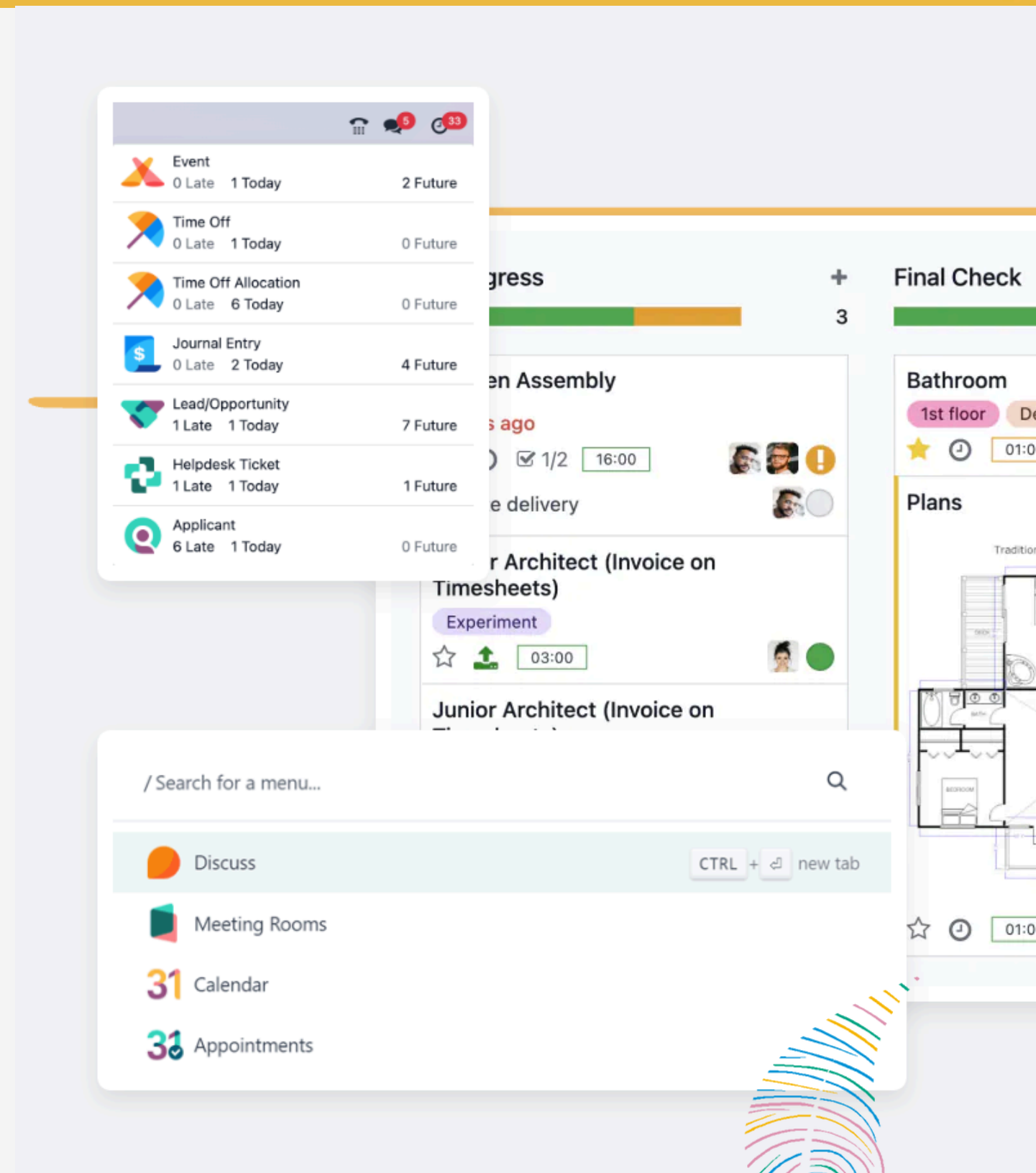


What we have

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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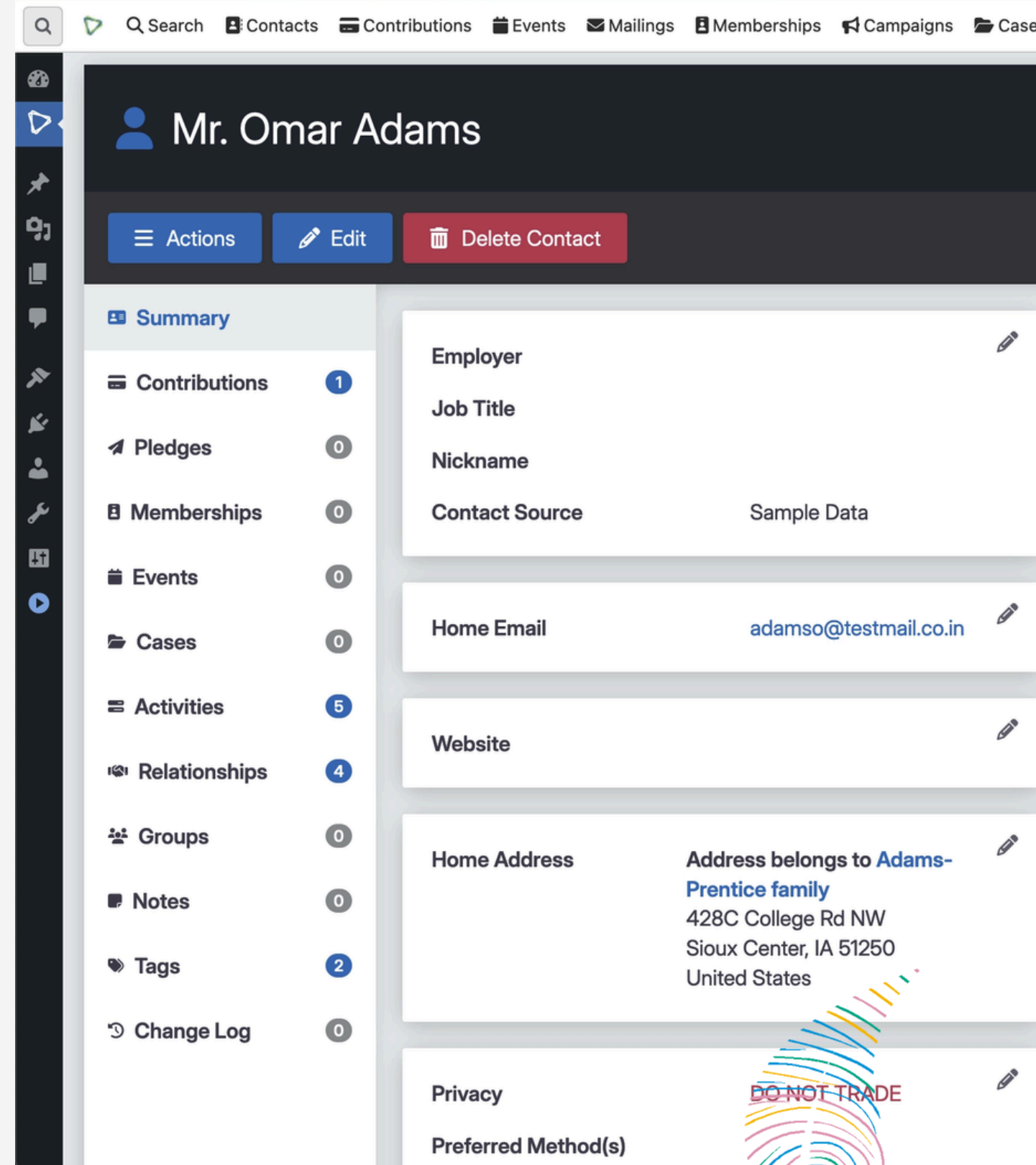


What we have

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 to our needs, and keep it's compatibility and integration over the future.



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What we want to achieve

CRM Dashboard Overview for Melisa Robertson (Marketing Administrator). The dashboard includes a sidebar with navigation options (Home, Dashboard, Menu Style, Pages, Contacts, Events, Missions, Projects, Organizations) and a main content area with the following components:

- Summary Cards:** Total Contacts (237), Total Events (15), Total Missions (5), Total Projects (3), Total Organizations (60).
- 655 Participations:** A line chart showing 'Participations' (blue) and 'Activities' (orange) over the last 6 months (Jan to Aug).
- Your contacts:** A list of latest contacts including Anna Mull, Jacob Jones, Jenny Wilson, and Leslie Alexander.
- Your events:** A table showing event progress and dates.

EVENT	PROGRESS	DATE	PARTICIPANTS
Event name	60%	25/06	MM PP SP
Event name	95%	25/06	MM SP
Event name	100%	10/06	TP PP
Event name	100%	20/05	TP MM PP SP

CRM Profile Page for Melisa Robertson (Marketing Administrator). The profile includes:

- About:** Contact information (Email: melisa@CRM.com, Phone: 0035912354789, Location: Portugal, Password: *****).
- Missions:** Natural Heritage Mission (2 Projects, 81 Months duration, 16 Partners institutions).
- Projects:** Community4Nature (Value lessons learned and utilize valuable results) and Dialogue4Nature (Strengthen relationships among key actors).
- History of events in which you have participated:** A list of four webinar events from November 2023.

Two smaller views of the CRM interface: a 'Sign In' form and a profile preview card for Melisa Robertson.



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What we want to achieve

The screenshot shows the 'Events' page in a CRM system. The header includes the CRM logo, a search bar, and navigation links for Natural Heritage, Interreg Euro-MED, and the European Union. The user is identified as Melisa Robertson, Marketing Administrator. The main content area is divided into three sections: 'Upcoming events' with a 'Web Workshop in 2 days' card, 'Calendar' for July 2024 showing an 'All day Event' on Thursday and a '10:20 Webinar' on Friday, and 'All events' listing four webinar entries from November 2023. A sidebar on the left contains navigation options like Home, Dashboard, Menu Style, Pages, Contacts, Events, Missions, Projects, and Organizations. The footer contains 'Privacy Policy', 'Terms of Use', and '© 2024 Natural Heritage Mission'.

The screenshot shows the 'Organizations' page in the CRM system. The header is identical to the Events page. The main content area features an 'Organizations list' table with columns for Organization, Country, Email, Number, and Mission. Below the table is a 'See All' button. To the right, there is a 'More engaged organizations' section displaying six organization cards, each with a name and a green progress indicator showing '+3.48%'. The sidebar on the left is the same as in the Events page. The footer contains 'Privacy Policy', 'Terms of Use', and '© 2024 Natural Heritage Mission'.



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What we want to achieve

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Contacts

Contacts list

NAME	LAST NAME	EMAIL	ORGANIZATION	MISSION
Robert	Wilson	robertwilson@example.com	Organization name	
Robert	Wilson	robertwilson@example.com	Organization name	
Robert	Wilson	robertwilson@example.com	Organization name	
Robert	Wilson	robertwilson@example.com	Organization name	
Robert	Wilson	robertwilson@example.com	Organization name	

Monthly contacts: 30 new contacts (30% increased)

21 of your contacts attended the latest event

Name of the event: 23 November 2023

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Projects

Community4Nature: Value lessons learned and utilize valuable results.

Dialogue4Nature: Strengthen relationships among key actors in the Mediterranean region.

Monthly projects: 2 new projects (100% increased)

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Missions

Natural Heritage Mission

- 2 Projects
- 81 Months duration
- 16 Partners institutions

Explore more

Partners



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Registration

natural-heritage.irradiare.eu/#/register

Scan me!



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