Customer Relationship Management
Planning page for CRM functionality in Tiki

What

What is a CRM?

Customer Relationship Management (ex.: a company)
Constituent Relationship Management (ex.: a political party)

My prediction, within 3 years the acronym "CMS" won't mean "Content Management System" anymore but will be redefined to "Community Management System"

For Tiki, we want a more distributed model, so we could call it a Community Relationship Management system. This last aspect includes the two previous ones, but has an emphasis on self organization. It is related to Social Networking and wiki-centric project management.

A bit like a groupware is a lot like a CMS but with more advanced permissions (when you have a public wiki & calendar, it's called a CMS, but when it's a private/shared wiki & calendar, it's called a groupware), a community relationship management system could be a Customer Relationship Management but that empowers everyone in the community. So users can create groups/projects/sections for initiatives.

Who

- Marc Laporte
- Jonny B and MatWho working on a (hopefully) simpler project addressing many of these issues (later 2008) - see GroupMail page
- Nelson Ko
- Pascal St-Jean
- Adam Miron
- Duane Kennedy
- Mike Girardin

Definition

- Contact Directory
- Organization needs to communicate and support
- Gather as much info as possible
  - relationship to other contacts/organizations
- Track all communication to an individual level
  - Who are you
  - What did we tell you
  - What did you tell us
• Track and Associate Tasks for workers associated to contacts

Requirements

• Database of records of unit of interest
• Member Tracking
• Track communications
  ◦ E-mail
  ◦ Newsletters
• Notes of conversations
• Search and Reports
• Import and Exports Data
• Associate Contacts into Groups
• Freetag Data and Contacts
• Feasibility of use for new users
• Fine Level Permissions
• Security
• Scalability
• Decision / Workflow Intelligence
• Mailer
  ◦ 0 - 4000 emails (Stock Tiki)
  ◦ > 4000 emails (Integration with email sending system)
• Payments
  ◦ Donations
  ◦ Membership Registration
• Phone / Auto-Dial feature (Skype)
  ◦ Phone Banking
  ◦ Info Tracker while calling
• List Management
  ◦ combine household residents
  ◦ eliminate duplicates
  ◦ address management (possible google maps integration)
    ▪ all current CRMs use one field (very poor)
    ▪ we need info consistency
• Custom form validation
• Ability to write custom queries

Missing Tiki Features

• Tracker Encryption
  ◦ E.G Credit Card Numbers
  ◦ Share Passwords
  ◦ API Keys
• Tracker History
Use Cases
Organizations that require membership tracking

- Small Organizations
- Associations and Groups
- Political Parties
  - Nominations

CRM systems

Zarafa http://www.zarafa.com/
(with zPush) to connect mobile devices

Highrise (37 Signals)
- Could be a good base to emulate

SugarCRM
Opensource version is not full featured, see SugarCRM feature comparison

vTiger
Opensource with all features.
They made a good comparison of themselves to the 3 big CRM players:

- http://www.vtiger.com/crm/salesforce-comparison/

Civi

SalesForce

Zoho

XRMS (project on sourceforge)

Thoughts about necessary Components
There are several key components making up a good CRM:
business partners (This is the terminology used by SAP, I find it general enough to fit here) is an entity representing either
  ◦ a person
  ◦ an organisation
  ◦ a group of the above
  ◦ a person or organization should be able to be linked to more than 1 business partner (a person should be able to be linked to the Tiki development team, a family, and a company)

Addresses are attached to a business partner
Contact informations are attached to a business partner. These store phone numbers, fax numbers, email addresses, icq numbers, web sites and so on. Different contact types may allow triggering different actions, like clicking on an email address triggers sending a mail, clicking on a phone number allows to skype or call the contact via tapi/external helper

Roles define my/our relations to a business partner. My relations to a business partner are defined by roles. Every business partner can assume different roles at the same time (like employee and customer) Examples of roles are:
  ◦ contact: Someone I talked to, know somehow but have no actual contract/relationship with
  ◦ employee
  ◦ key account manager: an employee who cares for my clients (this information can be attached to the customer role of a client, allowing me to see who of my employees cares for that customer)
  ◦ customer
  ◦ supplier
  ◦ Account: A business partner must not be a registered user, but if he is, a link to that should be available, too

Contracts define my relationship with almost every business partner. A business partner can have several contracts with me (and in different roles). A contract contains
  ◦ start and end dates
  ◦ documents (the actual contract)
  ◦ Scheduled actions

Actions are a sort of protocol, who did what with a customer. Here we store the information about emails, letters, offers, phone calls and so on. Actions can also be scheduled

Notes: I want to store additional information as free text, choosing either to publish it to others by assigning permissions or keep it private

Related links

- Discussion on Dev list
- Social Networking
- Project Management
- Marketing Automation
- Some ideas
- Contacts
- Contact Relationship Manager project
- CRM
- Constituent Relationship Management
- TikiCRM
• http://profiles.tiki.org/Customer_Relationship_Management
• Compiere: Open Source ERP + CRM Project
• http://goplanapp.com/
• http://wikisuite.org/Customer-Relationship-Management