

An isometric illustration on a dark blue background. In the center is an open laptop with a light blue screen and a dark blue keyboard. To the left of the laptop is a stack of three books with light blue, white, and orange covers. Below the laptop is a power plug with a light blue body and a red cord. To the right of the laptop is a document with a light blue background and a dark blue circuit diagram. The title 'SIO - Presentation 1' is written in a light orange, sans-serif font to the right of the laptop.

SIO - Presentation 1

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Summary



Application in the context of the UA

The University of Aveiro has multiple data sources spread among different platforms.

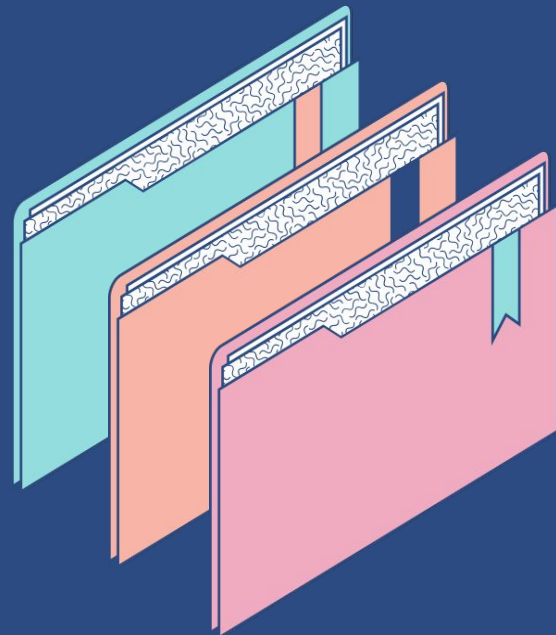
SIGACAD - Academic Management System

SIGEF - Financial Management System

RHumo - Integrated Human Resources Management System

PACO - Academic Portal

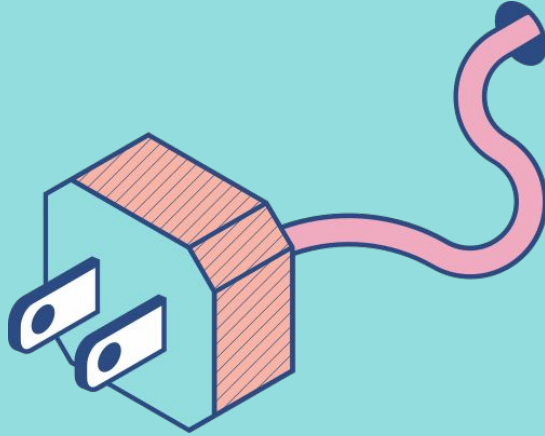
RIA - Institutional Repository



Structural Features of a CRM

- Contact Management
- Customization
- Marketing Automation
- Sales Management
- Customer Service and Support
- Integration with other Tools
- Reporting and Analytics

Specification Booklet to our Study Case





Non-Functional Requirements

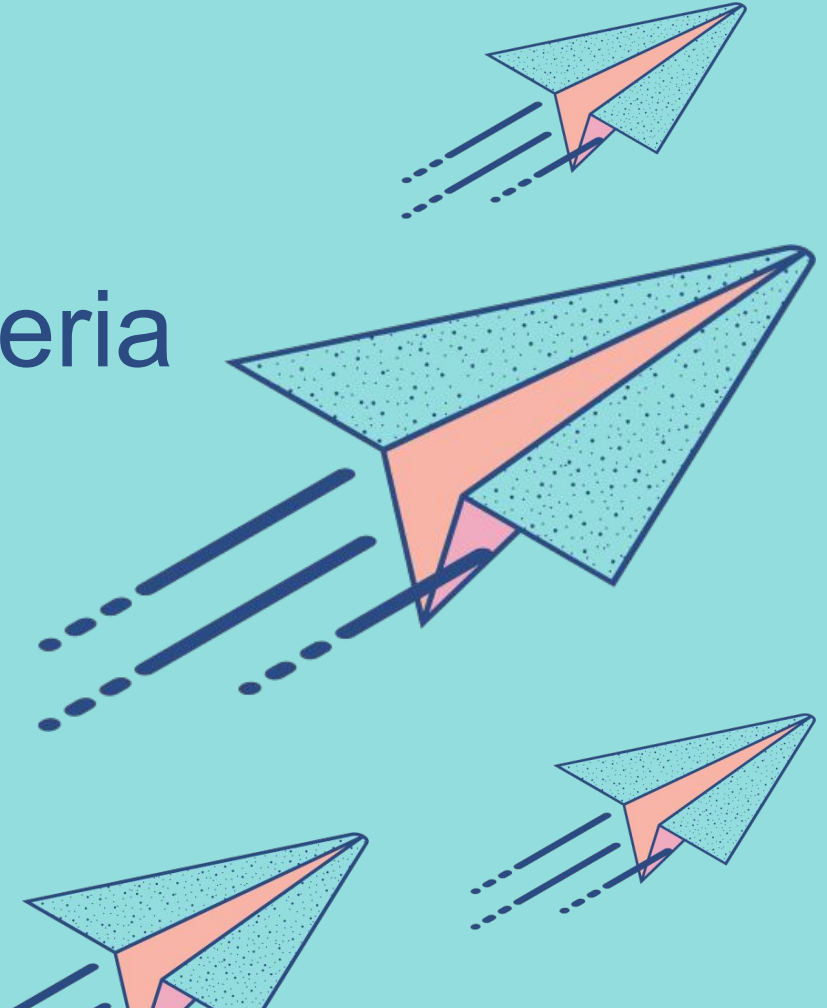
- Customizability
 - Accessibility
 - Security
- Reporting and analytics
- Integration with existing systems
 - Support and community
 - Availability
 - Scalability



Functional Requirements

- Manage and maintain detailed contact information
 - Track and manage all interactions
- Ability to generate reports and dashboards that provide insight
 - Integration with student information systems
- Ability to access the CRM system from mobile devices
 - Ability to automate routine tasks and workflows
 - Ability to customize fields, forms, and workflows
- Ability to communicate with other institutions' CRMs
 - Ability to integrate with an AI service (e.g. bot)

CRM Selection Criteria





Selection Criteria

- Customizability
 - User Interface
 - Security
 - Reporting and Analytics
- Integration with Existing Systems
 - Support and Community
 - Availability and Scalability
 - Mobile Accessibility
 - Workflow Automation
- Customization and Communication

Odoo CRM



Benefits

- User-friendly interface
- Customizable workflows and pipelines
- Integrates with other Odoo modules
- Offers a wide range of features and functionalities
- Provides real-time data insights and analytics.

Drawbacks

- Steep learning curve
- Reporting options are limited
- Customer support dependent on community members.

X2 CRM



Benefits

- User-friendly interface
- Offers customizable workflows and pipelines
- Provides advanced marketing automation features
- Integrates with third-party platforms and extensions
- Provides advanced reporting and analytics capabilities.

Drawbacks

- Limited documentation and resources available for troubleshooting and support
- May not be suitable for larger businesses or those with complex data models.

Espo CRM



Benefits

- Offers a wide range of features and functionalities, including project management and inventory management.
- User-friendly interface and mobile compatible
- Offers customizable workflows and pipelines
- Integrates with third-party platforms and extensions
- Provides advanced reporting and analytics capabilities

Drawbacks

- May not offer as wide a range of features and functionalities as some of its competitors
- May require technical expertise for customization and implementation
- May not be suitable for larger businesses or those with complex data models.

Civi CRM



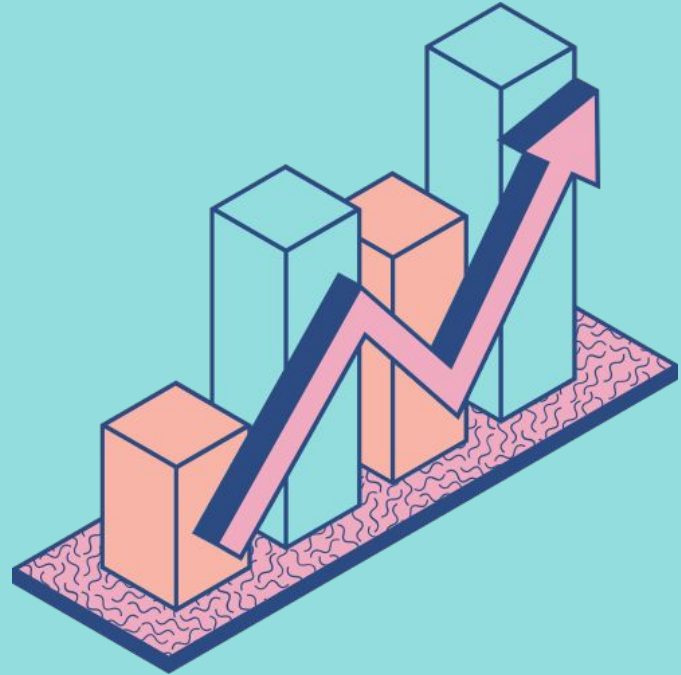
Benefits

- Open-source and free to use
- Contact management
- Highly customizable to fit specific organizational needs.
- Integrates with third-party platforms and extensions

Drawbacks

- Limited documentation and resources available for troubleshooting and support
- May require technical expertise for customization and implementation
- May not be suitable for larger businesses or those with complex data models.

Chosen CRM to the UA





CiviCRM®



- Built to organizations rather than companies
- Organizational management oriented
- Customizable complex contact management
- High integration
- Free

Conclusion

- It is crucial to have a reliable and efficient CRM system in place
- Manage and organize members' data, communication and collaboration
- Improve its overall efficiency and productivity.

