Best practices to support commercial relationships at the Czech National Competence Centre in HPC

Best Practice Guide

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Introduction

This document sets out best practices for commercial relationship support at IT4Innovations within the National Competence Centre (NCC), which is represented in the Czech Republic by IT4Innovations National Supercomputing Center based at VSB – Technical University of Ostrava. It describes the communication and work with clients that forms one of the activities of commercial relationship development support within the NCC.

Structure of the document:

1. Data sources
    a. Database selection
    b. Data filtration
2. Handling data within the Client Relationship Management (CRM) system
    a. CRM system selection
    b. Work with leads
    c. Work with prospective clients
3. Communication with clients
4. Maintenance of client relationships
5. Networking
6. Summary of key points

Two conditions are essential for the successful identification and subsequent development of client relationships:

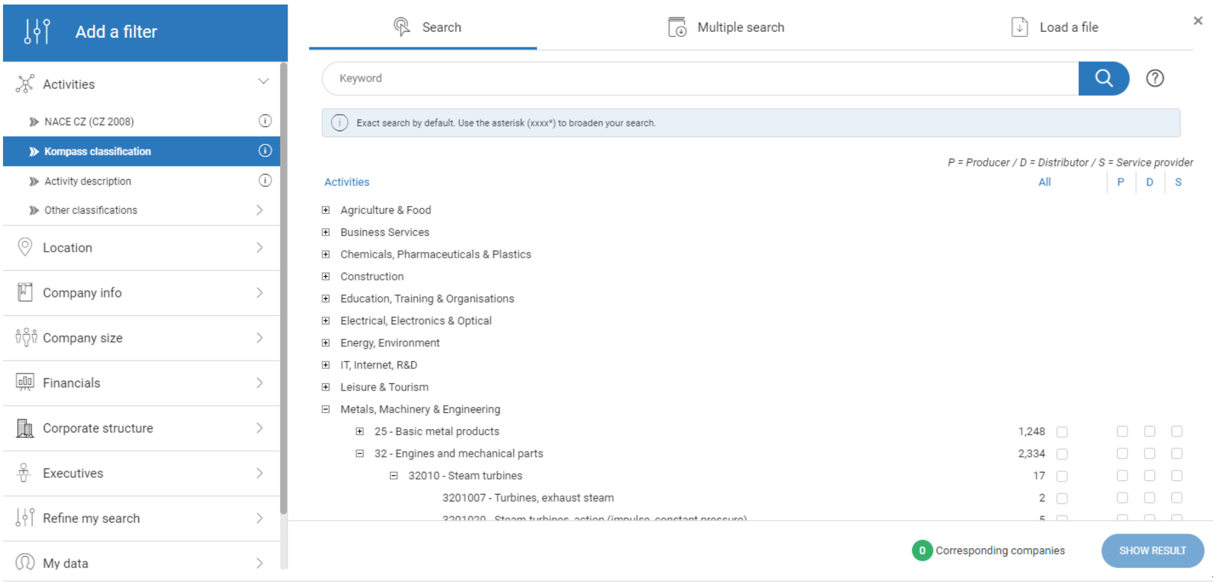
- to have access to a database of companies with the possibility of data filtering,
- to use the CRM system to record notes and activities and keep track of deadlines and workflows.

1. Data sources

As a source of contacts, we use the database information service of KOMPASS Czech Republic, s.r.o., (www.kompass.com).

KOMPASS is an international online provider of business databases primarily for the Business-to-Business (B2B) sector. It allows users to search for other companies both in the Czech Republic and abroad. The KOMPASS database is continuously updated.

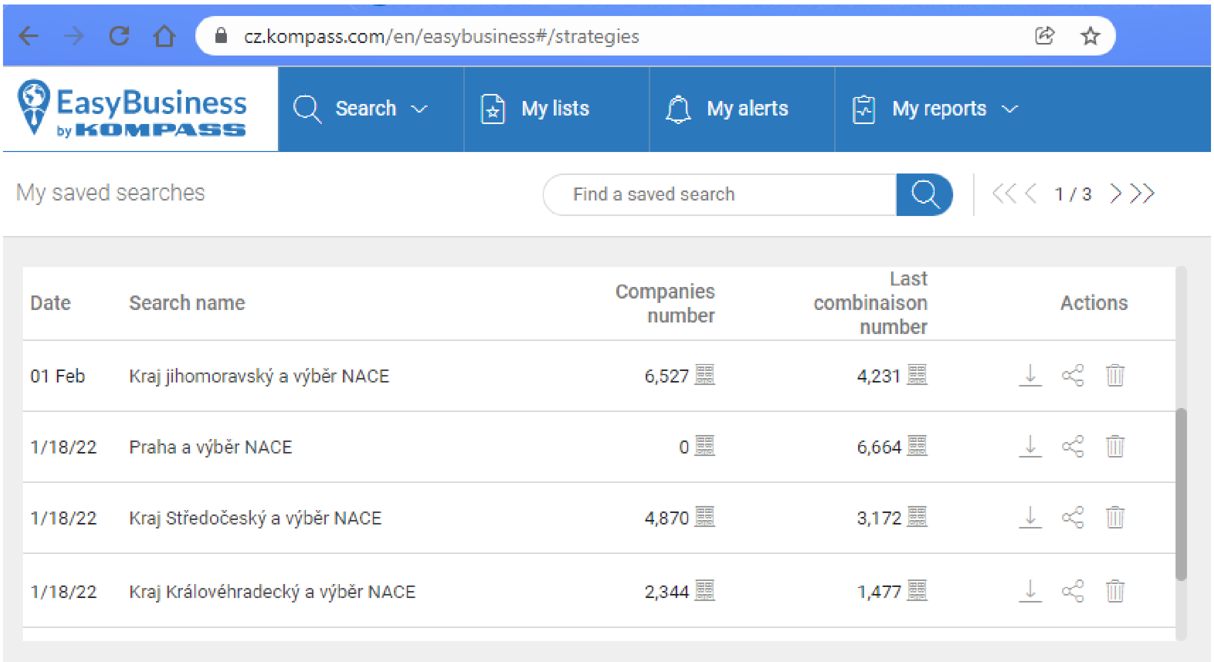
We chose this database because KOMPASS provides a very detailed classification of companies. Thanks to this, it is possible to filter companies and create an initial list of contacts, called leads.



The support for the development of commercial relationships within the NCC is mainly focused on four domain areas arising from the NCC competences, namely using numerical modelling and simulations algorithms, methods and tools in engineering, material science and nanotechnology, big data analytics, and artificial intelligence.

As the domain knowledge is quite broad, it is difficult to set up an initial filter of companies in the classification so that the selected set is narrowed down to companies that are suitable to be approached. Companies may be addressing problems that are not only related to their products but may also be tied to a production machine within a production line, or the challenging assignment may come from a client (e.g., in an automotive chain). Therefore, we do not initially filter companies by classification to select them directly; instead, we select as many companies as possible that are not suitable to be approached, thus reducing the target database of leads. This eliminates non-relevant companies and offices such as haulage firms, schools, theatres, etc.

After applying the filters, we obtain lists of potential companies by region:



Date	Search name	Companies number	Last combinaison number	Actions
01 Feb	Kraj jihomoravský a výběr NACE	6,527	4,231	
1/18/22	Praha a výběr NACE	0	6,664	
1/18/22	Kraj Středočeský a výběr NACE	4,870	3,172	
1/18/22	Kraj Královéhradecký a výběr NACE	2,344	1,477	

These lists are then downloaded to the CRM system.

2. Handling data within the Client Relationship Management (CRM) system

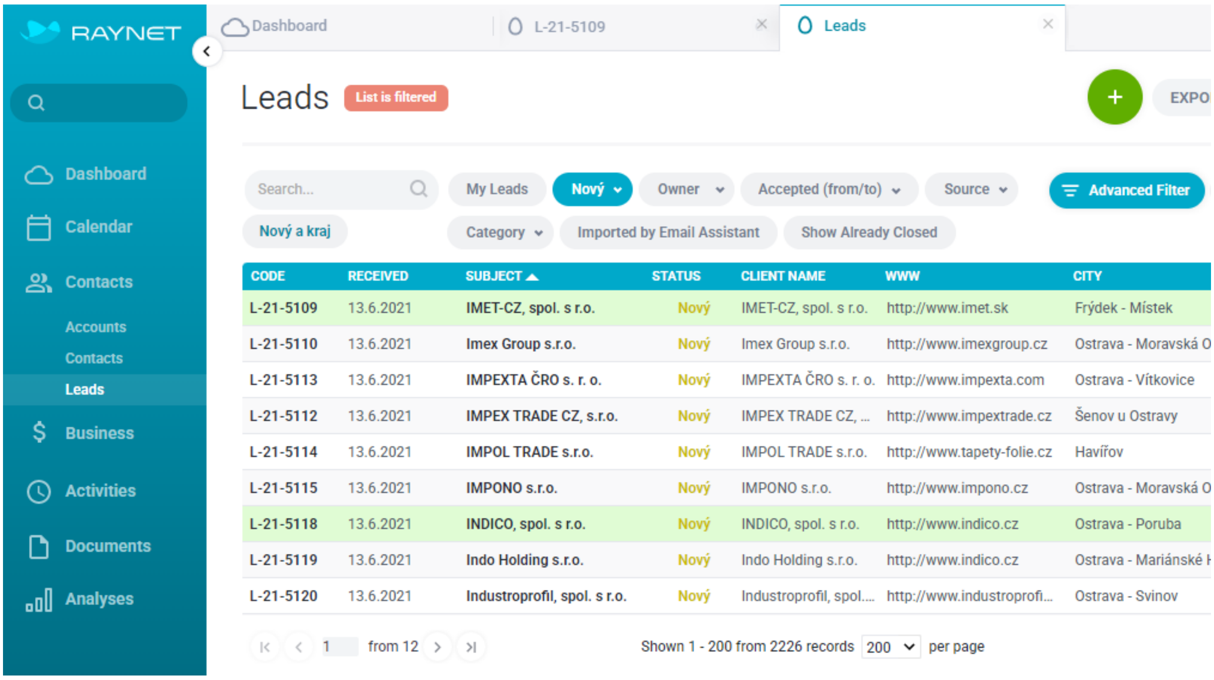
When approaching companies, we get lots of information by phone, when e-mails are exchanged, contacts are changed, links to other companies are made, and various activities are planned. Without a CRM system, it would be impossible to organise individual information and activities effectively. The use of a CRM system is thus a necessity for this work.

Our requirements for a CRM system were as follows:

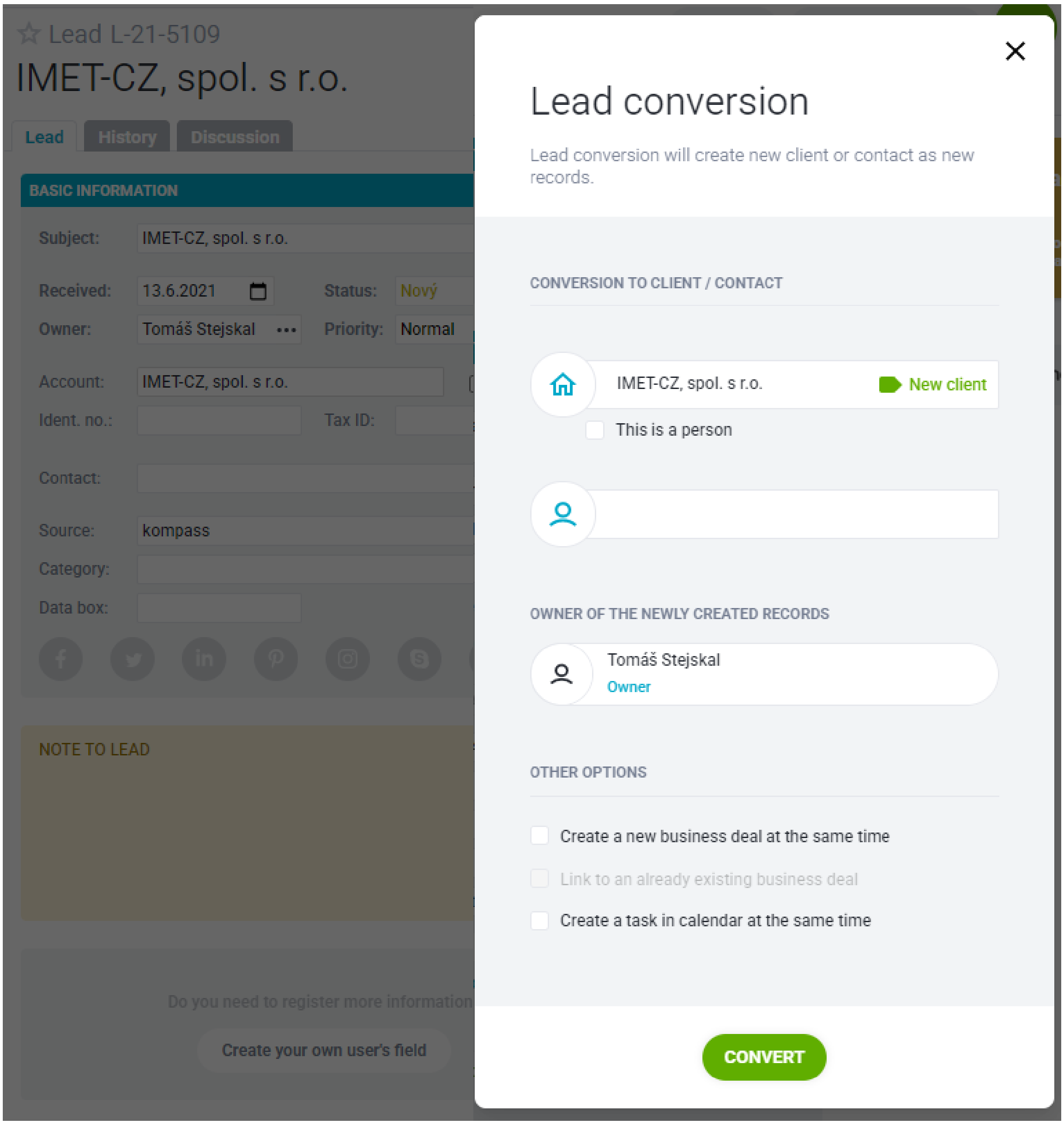
- Simple
- cheap
- robust
- online
- well supported
- with a database of owners willing to negotiate.

The CRM that was most appealing to us was Raynet (https://raynetcrm.com/), which met all the requirements and had good references in our area.

Imported lead lists need to be manually checked and can then be given the status of 'Potential client'. This decision is made by checking the business area of the company on the Internet; the initial filter according to the classification is not perfect and will let many companies unsuitable for our purpose through to processing. These companies are eliminated by this check. The basic question is whether this company has activities where a common interest could arise.



This decision is usually easy and quick. However, it is sometimes a bit of detective work, and tracking down more information can be necessary. For example, we are interested in whether the company is part of a more complex organisational structure, and sometimes the company's products or production lines are not completely obvious.

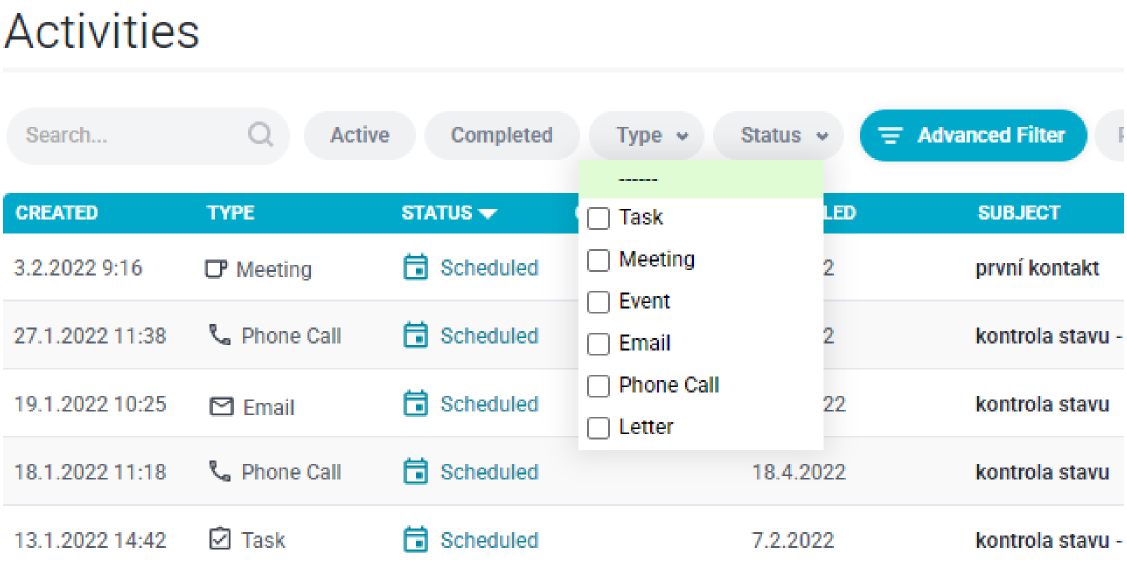


Verified leads are included in the list of 'Clients with Potential' after conversion. These candidates are suitable to initiate contact with, which starts active work with the client.

The basis for quality client relationship management in a CRM system includes two conditions:

- every activity must be recorded,
- a new activity must always be scheduled after recording a past activity.

If these conditions are not met, the information chain will be disrupted, which can lead to the loss of the client.



Any activity or task can be recorded in the CRM system.

3. Communication with clients

Active work begins with a review of all available information about the client so that we are well prepared for the first contact. Knowing the client greatly helps us to react during the first conversation, helping us to need only one call to clarify the necessary information, find a suitable area of cooperation, and propose a meeting.

After the first contact, we should have answers to questions relevant to the further development of the client relationship that we can provide to colleagues who will be present at the follow-up meeting, e.g.:

- Does the company have an R&D or any related department that we can deal with professionally?
- Are they developing a product or service where we can help with our expertise?
- Does the company have a production line where optimisation using some particular domain of knowledge would be useful?
- Is it part of a global solution or a corporation where R&D is located abroad, and to what extent is the local R&D dependent on it?
- What software and hardware equipment does the company use? Would they use HPC and have SW licenses for the use of HPC?
- Are they part of a research consortium? Do they have experience with research and the capacity to submit grant applications?
- Do they work with big data and process, analyse, and visualise it?

- Are they members of an industry cluster or a strong supply chain (e.g., automotive) with ambitions for further growth?
- Does the company export? Does it have branches? What are their trading regions and what standards do they have to meet?
- Occasionally, a company's job posting will give a clue as to which skills they are in demand of, and therefore where they are weak, and what kind of collaboration might appeal to them.

The most effective communication methods for maintaining good client relationships are phone calls and meetings/conference calls. These have several great advantages; they do not take up much time, and both parties can respond, clarify their views, and agree on the next steps immediately.

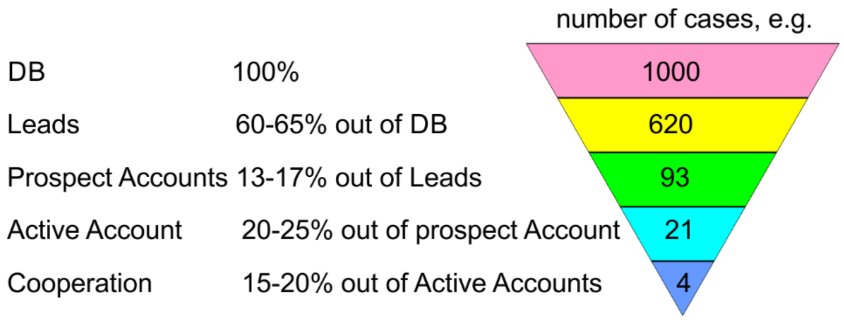
If we already have a potential client, the best way to establish communication is to call the person in charge. It can be the CEO, Production Director, Technology Specialist, or Head of the R&D department, for example. If no direct contact for the R&D department or another specialist is given and it is difficult to get one, then it is necessary to do research on the Internet. We can use LinkedIn, or search for the right person to contact through other professional sites, articles, and reports. Sometimes there is nothing to do but to try to find the correct email format (Google search for "email format company") and approach the person with an explanation.

email format abb

ABB Email Format

	ABB's Email Format	Percentage
first '.' last	**jane.doe@abb.com**	93.6%
first last	janedoe@abb.com	1.1%
last first_initial	doej@abb.com	1.1%
first_initial last	jdoe@abb.com	1.1%

The first contact helps us to select companies that would find cooperation with us interesting. Over the following months, these companies are contacted on an ongoing basis, some of whom will become active clients who subsequently use HPC and NCC services. If the possibility of cooperation is supported by funding from a grant, the company is motivated and shows more interest (e.g., Proof of Concept).



4. Maintaining relationships with clients

In the business world, it is known that it is much easier to keep a client than to get one. This is reflected in the statistics, which clearly show that 4 out of 1000 companies cooperate with us. This is where the data recorded in the CRM system in the client's history plays a role. If we occasionally call a client, we can remind ourselves of something that they remember and that we can find in their history: a recent success or an interesting fact. This gives us a nice way to follow up on the previous activity and get updated information.

If the client has already cooperated with us, it is very important to have updated information on how the cooperation turned out and what the timeframe was, and who the contact person was.

Even when maintaining relationships with clients, it is necessary to fulfil two conditions in CRM, namely: every activity must be recorded, and a follow-up activity must always be planned after the recording of the past activity.

5. Networking

"A few months ago, I spoke to a company that made exactly what you are looking for. I'll send you a contact." – If you help others in this way, they will remember you better. Networking helps you to be seen and heard more, increasing the chance that your phone calls will be accepted, and your emails will not go unanswered.

6. Summary of key points

Key operations for business development that we follow at the NCC:

- database sources of companies with the possibility of data filtering based on classification,
- CRM system for managing work with clients,

- adherence to the principles of work in CRM – continuous updating and planning of activities.

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