Customer Relationship Management

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> *Customer relationship management (CRM) is an approach to managing a company’s interaction with current and future customers. The CRM approach tries to analyze data about customers' history with a company, in order to better improve business relationships with customers, specifically focusing on retaining customers, in order to drive sales growth.* ***One important aspect of the CRM approach is the systems of CRM that compile information from a range of different channels, including a company’s website, telephone, email, live chat, marketing materials, social media, and more.*** *Through the CRM approach and the systems used to facilitate CRM, businesses learn more about their target audiences and how to best cater to their needs. However, the adoption of the CRM approach may also occasionally lead to favoritism within an audience of consumers, leading to dissatisfaction among customers and defeating the purpose of CRM.*
>
> *Wikipedia*

Thus, there is no way to make a truly awesome CRM until all systems are nicely integrated:

- Openfire: all XMPP chats, and contacts via the live support system (Fastpath)
  - Users share their email address here so we can use to look up information.
- FusionPBX: all calls from and to a specific contact or an organization. Ex.: How to always forward inbound calls to a specific number (ex.: your account rep)
- Tiki Wiki CMS Groupware: all data related to a contact or organization (comments, wiki pages edits, forum posts, ticket system, shopping cart, accounting, event registrations, newsletters, contact form, stats of visits and actions etc.): mainly via https://doc.tiki.org/Trackers
    - Also for dashboards, automation and business intelligence
  - For newsletters and transactional emails, we should have functionality like https://github.com/mlandauer/cuttlefish/.
  - All videos (ex.: webinars) watched by a specific contact or an organization
- Search engine should fetch all the data and display in Tiki.
- JMAP: all emails sent and to and from a contact or an organization (in development)

And we will need a way to deal with data / leads from social networks and advertising (marketing automation).

- If we know the social networking handles (ex.: on Twitter), we can check the information there.
- Ad purchases and affiliate marketing

To do: test https://doc.tiki.org/Federated-Search with ManifoldCF

Also, we should explore https://tincanapi.com/

https://tiki.org/Use-Cases-for-NLP-and-IR-in-Tiki

https://www.cmscritic.com/cms-crm-marketing-automation-why-your-brand-needs-all-three/

WikiSuite: The most comprehensive and integrated Open Source enterprise solution.

See also:

- item42-Build-an-awesome-CRM-with-all-relevant-components-working-smartly-together

See also

- Why
- Why ClearOS
- Why Cyrus IMAP and Cypht
- Why Free Libre Open Source software
- Why Not
- Why Openfire
- Why Syncthing
- Why Tiki Wiki CMS Groupware