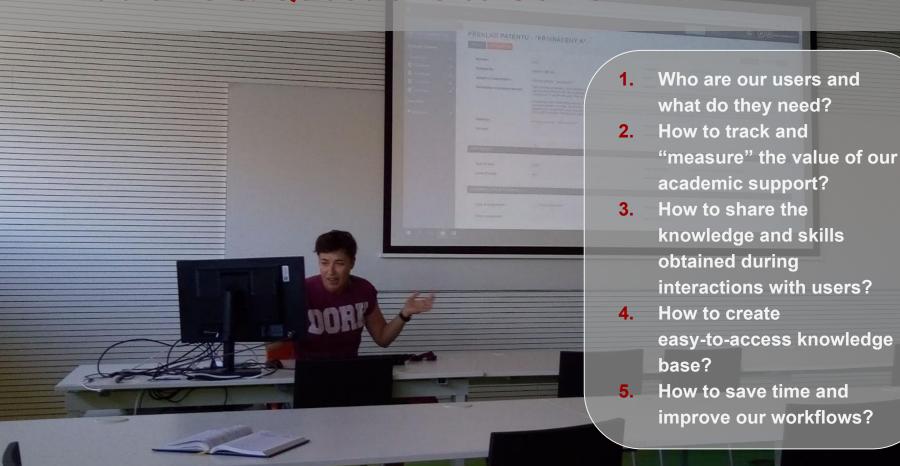


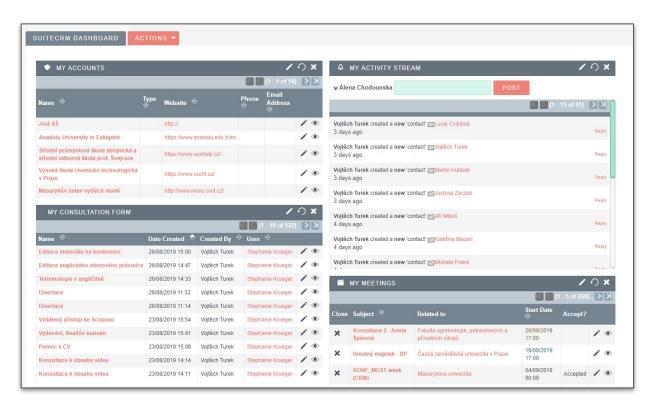


## **Problems & Questions to Solve**



									I
0									
	1	435	Překlad patentu - "přivrácený k"	Medium difficulty	In person	Other	06/06/2019	22/07/2019 10:10	P
	-	449	Research approaches or techniques other than Google	Simple	In person	Teacher/Researcher	23/05/2019	30/07/2019 12:34	P
	/		1-H NMR stanovení botanického původu medu	Medium difficulty	In person	Student	17/04/2019	12/04/2019 18:34	P
	-	283	Tvorba počítačové kooperativní hry	Medium difficulty	In person	Student	20/03/2019	18/03/2019 09:58	P
	1	276	Zdroje pro předvědeckou práci - Signatáři Charty 77	Simple	In person	Student	05/03/2019	28/02/2019 13:17	P
	1	275	Citování printscreenu z youtube vídea II (pokračování)	Simple	Email	Student	24/02/2019	26/02/2019 12:08	P
	1	274	Citování printscreenu z youtube videa	Simple	In person	Student	17/02/2019	22/02/2019 12:50	P
	1	83	Vzdělávací sy tán v Francisco	Simple		TOTIO	84/12/2018	29/01/2019 14:03	P
	1	268	Tvorba kuriku a, p) — či i v + ci emie	High (#2.4 ty	INTROD	Tane Releaser	1/2018	21/02/2019 09:32	P
		267	Spolupráce se sš, projekt "Šablony"	High difficulty	In person	Student	22/11/2018	21/02/2019 09:25	P
	1	22	Geografické problémy Velkoevropských měst	Medium difficulty	In person	Student	08/06/2018	14/09/2018 09:12	P
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	/	26	Syndrom vyhoření u zdravotnického personálu psychiatrických léčeben	Medium difficulty	In person	Student	23/02/2018	14/09/2018 10:20	P
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	1	508		Medium difficulty	In person	Student	23/10/2017	15/08/2019 14:07	P
	-	509		Medium difficulty	In person	Student	16/10/2017	15/08/2019 14:34	P

### **CRM Solution**



## Customer Relationship Management (CRM)

is software used to
efficiently manage
information about
customers and their
interactions in order to
strategically improve
customer care and
customer/user satisfaction

Homepage of NTK CRM system based on free open source SuiteCRM

### **CRM at NTK**

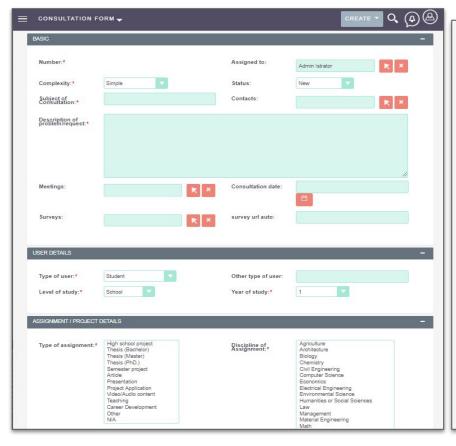
### Modules used at NTK

- Accounts = organizations
- Contacts = users
- Meetings = activities
- Reports
- Calendar
- Consultation Form = newly developed module for consultations

#### CONSULTATION FORM

	Subject of Consultation	Complexity <i>⇔</i>	Type of user   ⇔
0-	BULK ACTION~		
_ /	Translation of candidates for UCT Prague Rector message	Medium difficulty	Other
1	Editing title and abstract for sample thesis	Medium difficulty	NTK employee
_ /	Second editing of text on thin-walled structures	High difficulty	Teacher/Researcher
_ /	Bakalářská práce na téma: Klady a zápory veganské a vegetariánské stravy	Medium difficulty	Student
-	Translation of email into Czech	Medium difficulty	Other
-	Hmotný majetek - BP	Simple	Student
1	Editing of article on bricks and crashworthiness	High difficulty	Student
1	Ptejte se_původ slova plot	Simple	Public
1	Ptejte se_obsah kruhu nebo kruznice	Simple	Public
1	Vyobrazení palby a trajektorie ve starých tiscích.	Simple	Public
1	dotaz_citace a přístup ke knize	Simple	Student
1	editing of 10th anniv book content	Medium difficulty	NTK employee
1	Post peer review editing of article	Very advanced	Student
1	Editing of drones and agriculture paper	High difficulty	Student
-	Citace prezentace do DP	Simple	Student
1	Potravinářská barviva	High difficulty	Student
1	Even more 10th anniv. materials	Medium difficulty	NTK employee
1	editing of 10th anniversary materials	Medium difficulty	NTK employee
1	Editing of English children's book on birth process	Medium difficulty	Other
1	Next step suggestions for academic interview	Medium difficulty	Teacher/Researcher
-	Zadání BP - fenologický komplex jakonu	Simple	Student
1	Konzultace - citace BP	Simple	Student
1	Editing of article after first round, peer review	Very advanced	Student
1	Editing of article before peer review	Very advanced	Teacher/Researcher

## **Consultation Form Data Structure**



NSULTATION DETAILS			
Area of help:*	Searching & Evaluating Citing Citing Academic writing Editing Editing Language support Publishing Research Data Management Research Design Teaching support Access to E-resources Software support Document Delivery Professional Colleague Support Other N/A	How did you find us?	:* Friend/collegue
Other help:		Other finding way:	
Channel of Consultation:*	In person	Language of Consultation:*	Czech
Other channel:		Other language:	
Preparation time		Scheduling:*	Scheduled
Did you send Feedback form?:		Did you have problem?:	
Description of solutions or problems:*		4	
Full-Text Resources:	Academic Search ACM Digital Library American Institute of Physics ARPS APPS APPS APPS APPS APPS APPS APPS	Searching tools:	Google Scholar Soummon NTK Vulmin NTK Summon NTK Soummon OTU WorldCat Knihowny.cz eBooks A.Z eJournals A-Z
	Envigrofi ICE Engineering IEEE/IET Library IHS Engineering Workbench IOPscience JSTOR		



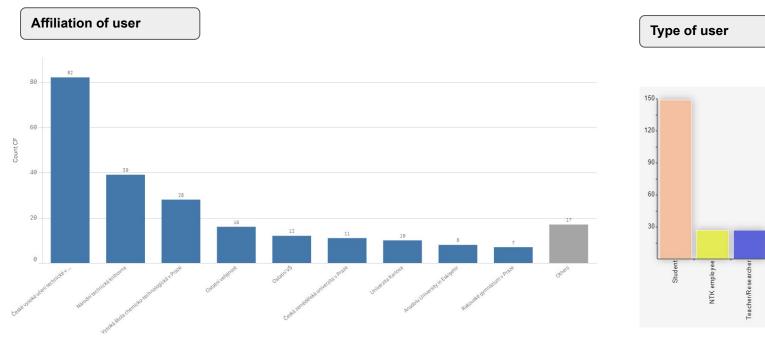
## **CRM Reports**

- Flexible report construction
- Data from different modules
- Export to CSV and PDF
- Import to other tools for further analysis, visualisation and business intelligence

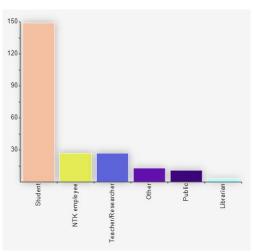




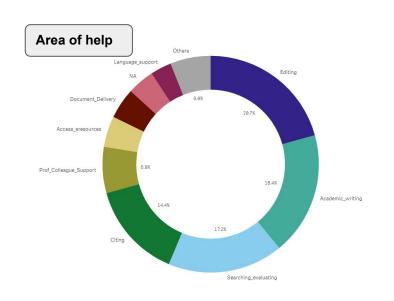
## CASE STUDY #1: Consultations in 2018 (n=230)

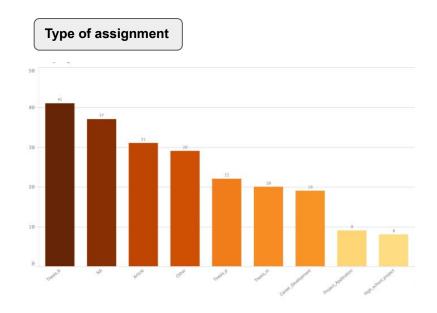


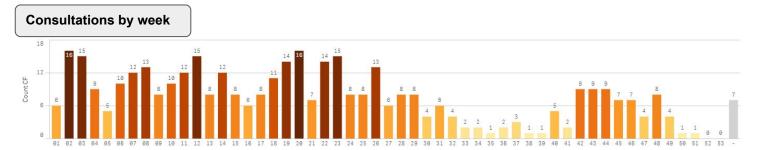




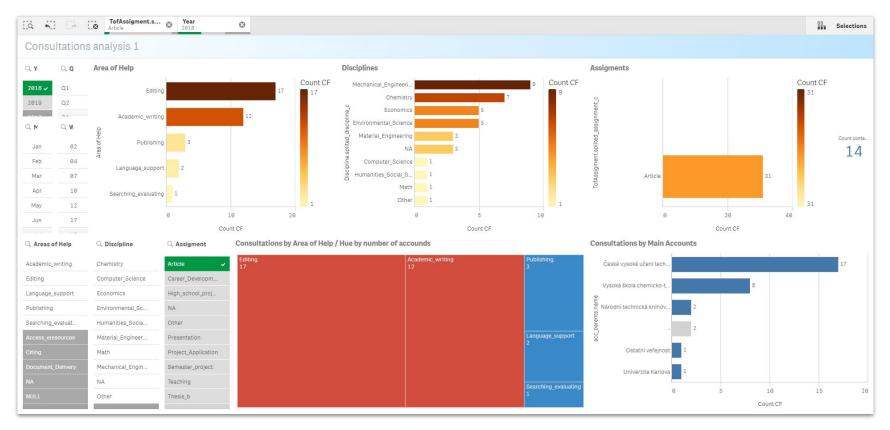
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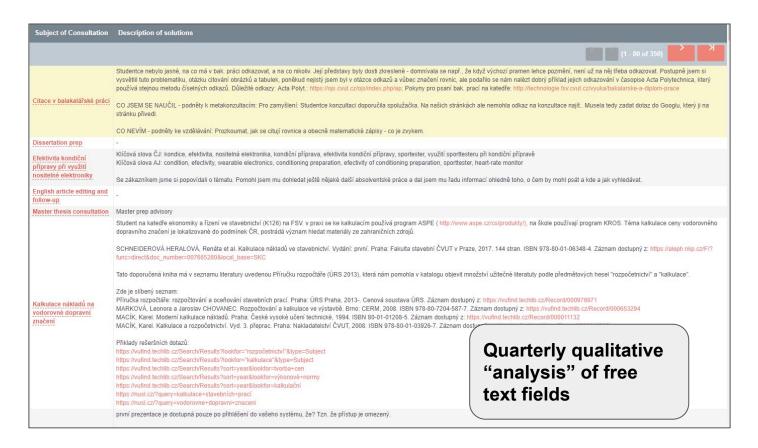


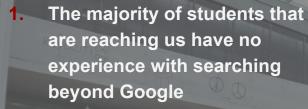


## CASE STUDY #2: Publishing Support in 2018 (n=35)



## **CASE STUDY #3: Understanding the Landscape**





- 2. The Bachelor's thesis is often the very first experience with academic writing for them
- 3. Many students don't know how to reach and approach their mentors
- 4. The scope of NTK information support team is much wider than "traditional" information support
- 5. The NTK supplements the functions of Academic Writing Center in campus

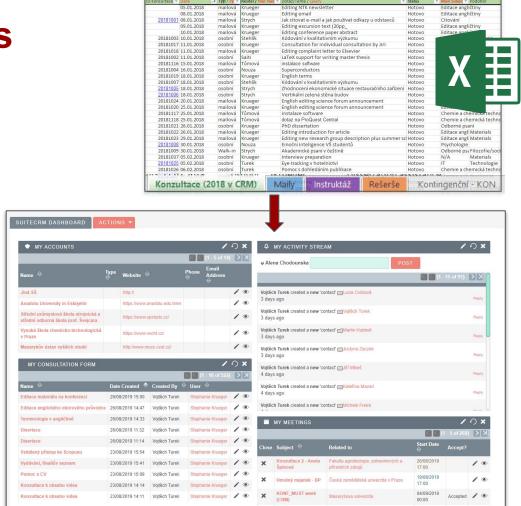
# Professional Development

- Enhance peer-to-peer personal knowledge exchange according to the principle of "vicarious learning"
- Share best practices as well as failures
- Support professional development of junior colleagues



## **Improving Workflows**

- Fewer errors and gaps in records and efficient data cleaning
- Better standardization (e.g., organizations and users naming policies, mandatory fields)
- Flexible access rights
- Everything "under one roof"
- Quick and easy reports and ability to work with big data (N rows, K columns)



								A
/	435	Překlad patentu - "přívrácený k"	Medium difficulty	In person	Other	06/06/2019	22/07/2019 10:10	P
,	449	Research approaches or techniques other than Google	Simple	In person	Teacher/Researcher	23/05/2019	30/07/2019 12:34	P
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-	83	DAVID'T VIIII CI		ICTOMIZA	TION	A <sup>1/1</sup> T <sup>18</sup>	29/01/2019 14:03	P
-	268	PART II: CI	Ng Vicul		Teichei Revierder	ZA112018	21/02/2019 09:32	P
-	267	Spolupráce se sš, projekt "Šablony"	High difficulty	In person	Student	22/11/2018	21/02/2019 09:25	P
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-	509		Medium difficulty	In person	Student	16/10/2017	15/08/2019 14:34	P

### **NTK CRM Vision**

### Requirements

- Free and open source tool
- Avoid programming as much as possible
- Be able to develop new modules specific for academic support instead of modifying existing

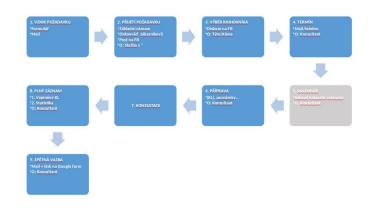
### Philosophy or principles

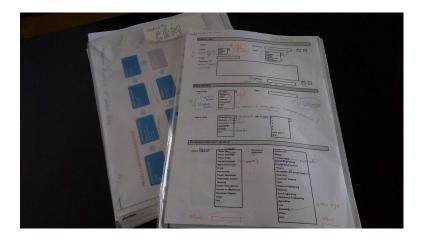
- Single rules, single naming, single responsibility, clear data
- Sustainable and agile development (prototyping, testing)



## **NTK CRM Agile Development**

- **1.** Determine and discuss goals
- Make process analysis of workflows
- **3.** Describe the data we want to collect
- **4.** Prototype and test with users
- **5.** Choose software
- **6.** Create new module in CRM and test it with users
- 7. Analyze the results and implement improvements
- **8.** Approve the module and move it in production

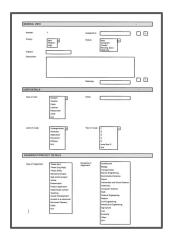




## **Consultation Form History**















**CRM Form Prototype** 



**CRM Form** 

1st Generation

Excel sheet with drop down

2nd Generation

Word sheet to capture details about users and interactions. menus and line view of data.

## **Future Development**

### Global goal

Analysis and estimation of users' needs over the years (according to GDPR)

### **Next steps**

- Integrate the consultation feedback surveys
- **2.** Create new module for instructional services
- 3. Extend internal knowledge base



# **Questions?**



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