







FAQ

# Research4Life CRM/Helpdesk

A lens on institutional support work 2019-20

-  [www.research4life.org](http://www.research4life.org)
-  [R4L\\_partnership](#)
-  [R4Lpartnership](#)
-  [Research4Life](#)

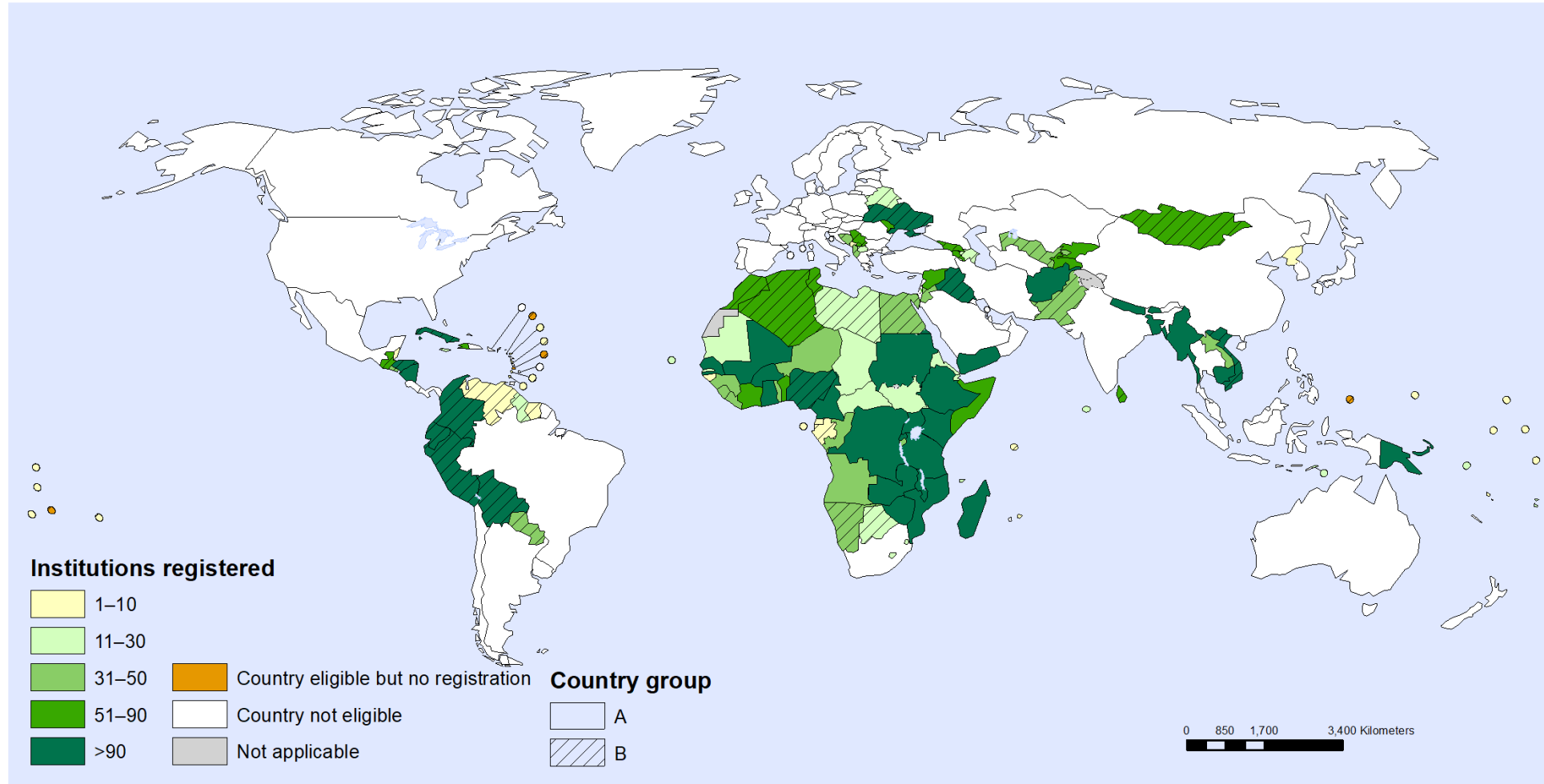


# CRM work

---

- Reviewing/processing institutional registrations
  - New institutions requesting access
  - Lapsed institutions requesting revival
  - Unaware already registered users requesting access
  - Ineligible institutions needing to be rejected
  - Complicated situations requiring manual intervention
- Institutional management
  - Updating contacts and removing bounced emails
  - Reminding about licenses and recording them
  - Providing login statistics for the institution
  - Setting up IP-based login functionality

# Supporting institutions around the world



The boundaries and names shown and the designations used on this map do not imply the expression of any opinion whatsoever on the part of the World Health Organization concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries. Dotted and dashed lines on maps represent approximate border lines for which there may not yet be full agreement.

Data Source: World Health Organization  
 Map Production: Division of Data, Analytics and Delivery for Impact (DDI)  
 World Health Organization

# Helpdesk work

---

- Users with problems getting in or getting access
- Publishers wanting content listed
- Basic technology hiccoughs
- Payment correspondence for Group B
- Supporting training events and associated user queries
- Everything else imaginable

# July 2019-June 2020 CRM

---

- We can now send revival messages automatically when a lapsed institution regains contact.
- After new registration or revival of an institution, the CRM now automatically sends a series of helpful “getting started” messages.

# July 2019-June 2020 Helpdesk

---

- ILO has joined the Helpdesk team
- WIPO staff member retired and an intern from WIPO has been supporting our work in the interim
- Response templates referring to FAQ
- Resolved a problematic spam score issue for the helpdesk – likely caused by abrupt shift to teleworking and multiple staff sending messages from the helpdesk from “unknown” locations.

# July 2019-June 2020 Website information

---

- How to register pages streamlined and clarified
- New list of academic registered institution now dynamic and always current.
- FAQs updated and aligned with the most popular questions in the helpdesk

# Adjusting for COVID-19

---

- Needed nimble adjustment to needs of users outside of their institutional settings
  - and extra work in the CRM and helpdesk to establish and provide temporary login accounts for end users
  - keeping appropriate connection to librarians and directors
- Publisher generosity to waive Group B institutions for those not able to pay
  - effect on the payment help desk, with explanations and alerts required for affected institutions



# Group continues to play a daily role

---

- Maria Folch (WHO)
- Christine Fresnel (WHO)
- Virgina Gitari (UNEP)
- Edit Horvath (ILO)
- Margaret Inkoom (WHO)
- Martin Mogga (WHO)
- Samuel Opiyo (UNEP)
- Kimberly Parker (WHO)
- Marina Pines (FAO)
- Philippe Sacchi (WHO)
- Jenna Sharpe (WHO)
- Puyuan Zhang (WIPO)