Best practices guide

From the

“Do’s and don'ts industry workshops”

EuroCC2 & CASTIEL2-WP4

June 2025

With NCC Sweden and NCC Austria

CRM, Contact Database, and Client Portfolio

- Inputs extracted from the presentations made by NCC Sweden NCC Austria
- On June 30th, 2025

Lead Management and KPI Reporting Guidelines

- Ideas from NCC Sweden

NCC Sweden

Use of self-developed tool: EuroCC Mapping Home

- Ideas from NCC Austria

NCC Austria

Do's

- Clearly define leads as potential clients before any action is taken (no owner assigned).
- Use multiple sources to find leads (e.g., LinkedIn, training events, industry organizations, incubators).

Don'ts

- Don't assign owners to leads;

  only assign them when converting to a

  deal.
- Avoid neglecting lead sources like

  industry events or incubators.

Lead Management

Do's

- Convert leads to deals only when an active dialogue with a contact person begins
- Assign a deal owner for accountability
- Document all outreach events (e.g., emails, notes, meetings)

Don'ts

- Don't skip documenting outreach events or contact person details
- Avoid leaving deals without clear stages or ownership

Deal Management

Do's

- Track participations separately for SMEs, large enterprises, public administrations, and academic/R&D institutions.
- Label activities by KPI categories (e.g., T2 for training, T3 for R&D support, T5 for service portfolio feedback).
- Use configured dashboards for easy visualization and conversion to Excel lists.

Don'ts

- Don't mix participation metrics across different client types (SMEs, enterprises, etc.).
- Avoid omitting KPI labels for activities, as this complicates reporting.

KPI Reporting

Do's

- Maintain clear stages for deals (e.g., "Lead," "Deal," "Follow-up").
- Qualify deals by documenting dialogues and interactions.

Don'ts

- Don't proceed with deals without qualifying them through documented dialogues.
- Avoid unclear abandonment criteria; decide early whether to continue or drop a deal.

Workflow Clarity

Do's

- ➢Add leads to Pipedrive via Excel imports, web interface, or mobile app.

Don'ts

- ➢Don't rely solely on manual entry; leverage Pipedrive's import/export features.

Tools & Integration

Do’s

- **Tool Selection & Usage:** Develop custom tools or adopt commercial CRM solutions, ensuring they are actively used by the team.
- **Event Tracking:** Record all hosted/participated events (organizer, participants, event links, dates) for deliverables and reports.
- **Entity Management:** Track companies with success stories, including project descriptions, meeting notes, and industry interactions.
- **Publication**: Document white papers and similar publications linked to collaborations.
- **Reporting & Data Integration**: Use a centralized database system to manage customer data and import external data (e.g., Notion).

Don’ts

- **Tool Implementation:** Avoid selecting tools without ensuring team adoption or long-term usability.
- **Event & Data Neglect:** Do not skip logging event details or post-event follow-ups.
- **Project & Collaboration:** Do not lose track of collaborations (e.g., unrecorded PoCs, unsigned NDAs). Avoid mixing active/finished projects without clear labeling.
- **Reporting**: Do not isolate data; integrate with other NCCs and stakeholders for comprehensive reporting.

CASTIEL 2

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