



D3.1 Customer Direct Tools Version 2.1

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Change Log

Version	Author	Description of Change
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V1.1	Mike Dewar	Update after BSC review
V1.2	Mike Dewar	Update after Maria Toth's comments
V2.0	Sally Bridgwater	Minor edits after EC Check
V2.1	Sally Bridgwater	Update after BSC review



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Executive Summary

This deliverable constitutes the tools to be used by the Consortium to track leads and customers, qualify leads, and to collect information needed to decide whether or not to offer a POP service to an organisation. It also contains an interim list of events which the Consortium may target to advertise POP and generate leads.

1. Introduction

Part of the role of WP3 is to identify potential users of the POP service (*leads*), identify which leads are worth pursuing, and collect enough information for the Consortium to decide whether they are suitable for POP services.

Leads will be generated through direct marketing and attendance at appropriate events. It is anticipated that potential users will either make direct contact with individual members of the Consortium or will express interest in POP by completing a web form requesting access to POP services (<https://pop-coe.eu/request-service-form>).

The next stage in the process is for a WP3 member of the Consortium to conduct a short interview with the lead, to collect more information about their application to allow an assessment to be made by the Consortium as to whether or not to offer them one or more POP services. The interview will be structured around a short template, to ensure that the information needed to make this assessment is available, but will also be used as an opportunity to seek other potential users of POP. If the application is successful, WP4-6 will take over at this point. If the applicants are unsuccessful then the reasons for this will be fed back to them with, if appropriate, suggestions for remedial action to allow re-submission of their request.

There is clearly a strong connection between the work of WP3 in the area of community development, and the work of WP7 in producing community development tools. In the case of this deliverable, we will use the service catalogue developed in D7.2 to advertise POP at the events listed here, and there is a fine line between attending events to attract customers (this deliverable) and attending events to disseminate results (D7.1)

2. Tools

2.1 Customer Request Form

A short form has been created by BSC at <https://pop-coe.eu/request-service-form> to collect basic information from potential POP users. As part of the



process of filling out the form the applicant must accept the Terms & Conditions of the POP Service. In defining these terms, we have tried to balance the needs of (particularly commercial) users for confidentiality, with the need of the Consortium to demonstrate the impact POP is having.

2.2 Terms & Conditions

POP is a European project financed by the European Union's Horizon 2020 research and Innovation programme under grant agreement No 676553. POP is the Performance Optimisation and Productivity Centre of Excellence in Computing Applications and provides performance assessment, optimisation and productivity services. POP services are delivered free of charge to organisations based within the European Union. POP is not a commercial service provider so there is not a commercial relationship between your organisation and the POP project partners, and commercial or civil rules between provider and customer are therefore not applicable.

By accepting the POP Service Terms and Conditions you apply to become a POP user. Applying does not guarantee that the service will be carried out, but POP commits to reply to all requests. If you become a POP user you agree to give us feedback on the quality of the service you obtain from POP, and grant us permission to publish statistical information on the percentage of potential performance improvement, the potential savings and other equivalent metrics that measure the results and impact of the POP service. POP undertakes that all such data will be anonymised before publication, and that we will not publish any other information concerning the service that we are providing to you without your explicit permission.

Any publication originated from the POP services must include the following acknowledgment of the support received from the project and from the European Commission: "We gratefully acknowledge the support of the POP project which has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No. 676553, and has partially contributed to this work."

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2.3 Customer Interview Template

The interview template is designed to allow an open conversation with a potential user about their application and what services they would like from



POP. It will work alongside the second questionnaire required in WP4 which can be filled directly by the user or by WP3 with the data collected during this interview. The assumption is that they have either filled in the *Customer Request Form* or will be invited to do so during the interview. The aim of the interview is to ensure that the customer is aware of what POP can do for them, and to gather enough information to allow the Consortium to evaluate whether to proceed with their request for assistance. It is likely to evolve as we gain more experience dealing with potential users. At present the questions are as follows:

1. Describe the application that you want analysed in terms of what problem(s) it solves and how it is structured.
2. Are there particular areas that you would like investigated, such as problems with scaling, IO, speed to solution, etc.? What impact would fixing these problems have on you or your organization?
3. Can we have access to the source code for the application and, if so, under what terms?
4. What architecture do you currently run your code on? Is this the target architecture for this work (and, if not, can you describe it)?
5. How big are the jobs you currently submit in terms of the number of cores and duration? To what extent are these decisions a product of administration policies on the machine (e.g. maximum job sizes, delays in clearing big queues, etc.)?
6. Can you provide us with access to your machine? If not, to what extent can you help us by installing our tools, or instrumented versions of your code? Are you happy for us to run your code on one of our machines?
7. Are there any time constraints on this work that we should be aware of?
8. Are there any internal procedures in your organization that would need to be completed before we can start to work?
9. Is there anything else that we should be aware of in considering your application to use the POP services?
10. Have you filled out the Customer Request Form on the web? If not, could you do so to indicate acceptance of our Terms & Conditions?
11. Finally, who should we contact regarding administrative issues, and to whom should we pose technical questions?

2.4 POP Community Database

The POP Community Database is a CRM system to allow the project to keep track of leads, users etc. It is the main tool that we will use to manage the POP community, including users and potential users of the POP services, and people who have expressed an interest in being kept informed of our activities. It is distinct from the ticketing system used to track the progress of the delivery

All contact details of leads will be stored in the Database, and assigned to an individual from WP3 to follow-up. As we assess the individual or organisation's interest in POP and suitability as a user, we will record details of their interactions with the project, records of discussions and interviews etc. Where a lead turns into a POP user we will record details of the services provided (via reference to the ticketing system) and the resulting deliverables, if NDAs are signed between POP and the user we will include them as well. We can also include information about how the lead or user was discovered but there is overlap with the information collected in the TRAC system in WP4 so is not necessary for all individuals. The CRM system stores linked entries for leads, POP users and TRAC reference and WP3 produced an internal document on how to use the CRM and TRAC systems and the links between the two. The Database will provide anybody in the project with a snapshot of a particular individual or organisation's history and status with POP. Using the data stored about leads and users and the data from TRAC about how users found out about the service can help us locate the best methods for contacting and converting leads into users.

We have identified *SuiteCRM* as the best candidate and have deployed it at NAG. It is distinct from the CRM systems used by NAG in its day-to-day business and will only be used for the purposes of POP, and only accessible to members of the POP consortium working on the project. Individuals taking part in WP3 from each partner have been given accounts. A screenshot of the CRM systems shows some of the stored TRAC reference that members of all partners have added to the system.

SuiteCRM - TRACReferences: Leads: POPUsers - TRACReferences: All							
Actions		Update		100 (1 - 20 of 24)			
Create TRACReference		TRACReference ID	Code	OK to Publish?	Organisation Name	User	Email Address
View TRACReference		100	SOWFA	Yes	National Renewable Energy Centre (CENER)	BSC	18/05/2015 08:47
Import TRACReference		102	ONETEP	Yes	University of Warwick	JSC	23/04/2015 12:07
Recently Viewed		104	PoC/Miles	Yes	University of Siegen	HLRS	05/06/2015 09:49
		108	PoC for IBM GraGLa2D	Yes	RWTH Aachen	Aachen	08/06/2015 09:50
		111	QUP	Yes	University of Warwick	BSC	18/05/2015 08:50
		113	GS2	Yes	STFC	NAG	24/05/2015 16:16
		116	SIESTA	Yes	Barcelona Supercomputing Center	BSC	08/06/2015 09:38
		118	Performance Plan OpenNN	Yes	Arctics	BSC	08/06/2015 09:40
		125	BAND	Yes	Software for Chemistry and Materials (SCM)	NAG	14/07/2015 15:24
		126	DFTB	Yes	Software for Chemistry and Materials (SCM)	NAG	30/06/2015 11:55
Favorites		131	mx2	Yes	University of Padua/orn	Aachen	08/08/2015 13:02
		135	Performance Plan GS2	Yes	STFC	NAG	05/08/2015 14:08
		54	VAMPIRE	Yes	University of York	NAG	04/02/2015 10:38
		60	DROPS	Yes	RWTH Aachen University	Aachen	20/05/2015 06:28
		61	OpenNN	Yes	Arctics	BSC	15/05/2015 06:11



2.5 List of Events

We maintain a list of potential events on the project Wiki where POP might look for potential users. Although we will attend some generic HPC events (e.g. PRACEdays) we hope mainly to target events focussed on specific sectors. In practice some events (for example International Supercomputing 2016) will also be opportunities for dissemination and our participation will be coordinated with WP7. We have also recently included a field to indicate which events have industrial attendance and participation so that we can focus more on these.

At the time of preparing this deliverable we have identified ten events (although four are closely related) in key sectors including CAE, Automotive & Aerospace, Oil & Gas, and renewable energy, taking place over the next six months. In addition, NAG will feature POP at some of the events it routinely exhibits at in Europe. The events are:

Name	Dates	Location	Sector
N8 HPC Network Event: New Approaches to Atomistic / Quantum Simulation of Materials	8 January 2016	York, UK	Materials
ICE Barcelona 2016	3-6 April	Barcelona	Oil & Gas/Geoscience
HIGH PERFORMANCE COMPUTING-BASED COMPUTATIONAL FLUID DYNAMICS FOR OFFSHORE RENEWABLE ENERGY WORKSHOP	7 - 8 April 2016	Lancaster, UK	(Renewable) Energy
NAFEMS Germany	25-27 April 2016	Bamberg	CAE
NAFEMS Nordic	10-11 May 2016	Göteborg	CAE
PRACEdays16	10 - 12 May 2016	Prague	All
NAFEMS France	8-9 June 2016	Paris	CAE
NAFEMS UK	15-16 June 2016	Telford, UK	CAE
ISC 2016	19-23 June 2016	Frankfurt	All
TERATEC Forum 2016	28-29 June 2016	Paris	Aerospace & Automotive, Manufacturing, ...

The Wiki list will be updated by the WP3 representatives at each site as new opportunities arise. We expect to maintain a program of events in a rolling 6-12 month window.

As of the 1st September the WP3 event list is as follows:

Name	Dates	Location	Sector	Industrial focus?
Research Software Engineers Conference 2016	15-16 September 2016	Manchester	All	N



7 th International Industrial Supercomputing Workshop	22-23 September 2016	Barcelona	All	Y
HPC User Forum	29-30 September 2016	Oxford	All	Y
Jara-HPC Symposium	4-5 October 2016	Aachen	Engineering, Materials	N
HLRS results and review workshop	13-14 October 2016	Stuttgart	All	N
International CAE Conference	17-18 October	Parma, Italy	CAE	Y
17 th Workshop on HPC in Meteorology	24-28 October 2016	Reading, UK	Earth Science	N
IoT Solutions World Congress	25-27 October 2016	Barcelona	IoT	Y
Supercomputing 2016	13-18 November 2016	Salt Lake City	All	Y
Smart City Expo	15-17 November	Barcelona	All	Y
Computing Insight UK 2016	14-15 December 2016	Manchester	All	Y
Cray XC40 Workshop on Optimization at Scale	2-5 May 2017	Stuttgart	All	N
European HPC Summit 2017	15-19 May 2017	Barcelona	All	N
Teratec Forum 2017	June 2017	Paris	All	Y

We are currently on target to attend events where at least half have a significant industrial presence, this is something we will continue to push forwards.



Acronyms and Abbreviations

- BSC – Barcelona Supercomputing Center
- CAE – Computer-Aided Engineering
- CRM – Customer Relationship Management
- D – deliverable
- HPC – High Performance Computing
- IoT – Internet of Things
- JARA - Jülich Aachen Research Alliance
- NAG – The Numerical Algorithms Group Ltd
- POP – Performance Optimization and Productivity
- PRACE – Partnership for Advanced Computing in Europe
- WP – Work Package