Stakeholders' management needs
Diagnosis Report

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1. Context

CERN operates in a complex international environment that includes Member States, associate and candidate countries, funding agencies, partner research institutions, industry partners, host state authorities, local communities and the wider scientific community. These stakeholder groups hold differing expectations regarding scientific output, technology transfer, societal impact and environmental performance. Effective stakeholder management is therefore critical to sustaining support for our scientific and broader societal mission.

Currently, stakeholder related information is scattered across multiple systems (e.g. email, contact databases, event tools, project trackers), with limited standardisation and no consolidated view. This fragmentation hinders coordinated engagement, makes reporting labour intensive, and increases the risk of inconsistent messaging or missed commitments.

Adopting a uniform and professionalised approach to stakeholder management, replacing the current mix of ad hoc processes and fragmented tools used within the Stakeholder Relations Sector, is therefore a strategic necessity. Such an initiative is fully aligned with CERN's strategic objectives, directly supporting *Pillar 3 – Value for CERN's Stakeholders* by enhancing engagement and responsiveness, and *Pillar 5 – Organisational Excellence* by improving efficiency, governance, transparency, and data-driven decision-making.

2. Problem statement

The Organization faces the following key problems:

- No single source of truth for stakeholder data (contacts, roles, interests, influence, engagement history, and commitments).
- Limited visibility across daily activity and programmes of Stakeholder Relations Sector
- Administrative and institutional data (e.g., HR statistics, procurement information, agreements such as ICAs, MoUs) are dispersed across multiple systems and repositories and are not centrally managed or easily accessible
- Limited standardisation exists for executive presentations, briefing notes, and reporting materials.

The absence of a centralised source of truth leads to duplicated or uncoordinated stakeholder engagement and increases the risk of missed commitments. Furthermore, the fragmentation of administrative and institutional data, combined with limited document standardisation, results in labour-intensive processes and reduces the Organization's responsiveness and efficiency.

Without a coherent stakeholder management system, CERN's efforts to enhance efficiency and simplify administrative processes, a key objective of its Organisational Excellence pillar, are weakened.

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3. Objectives

3.1. Objectives of the diagnosis

The purpose of this diagnosis is to evaluate the current stakeholder relationship management environment, identify current practices, pain points, desired features, and key requirements for the future SRM platform.

3.2. Objectives of a future solution

The future solution should ensure consistent messaging, timely updates, and efficient coordination across Stakeholder Relations groups, sections, and services. To achieve this, it should provide:

- A **single source of truth** for stakeholder information, including contacts, roles, affiliations, interests, and commitments.
- **Centralised, user-friendly, and rapid access** to administrative and institutional data.
- The ability to **link administrative and institutional data directly to stakeholder records**.
- Robust **reporting and analytics capabilities** to support meeting preparation, generate statistics, and produce segmented dashboards based on criteria such as country, stakeholder category, industry sector, and other relevant dimensions.
- The ability to **securely migrate historical stakeholder data from legacy systems**, ensuring continuity, data integrity, and the preservation of institutional knowledge within the future platform.

4. Scope

The scope includes all sections/services of the Stakeholder Relations Sector.

- European Union and International Organisations Relations (SR-SE-EUI)
- Partnerships and Fundraising (SR-SE-FP)
- Host State Relations (SR-SE-HSR)
- Non-Member State Relations (SR-SE-MS)
- Member and Associate Member States Relations (SR-SE-NMS)
- Protocol (SR-SE-PRT)
- FCC Territorial Implementation (SR-SE-TI)
- Translation and Minutes and Council Support (SR-SE-TMC)
- Education (SR-ECO-EDU)
- Global Outreach (SR-ECO-GO)
- Local Outreach (SR-ECO-LO)
- Content (SR-ECO-CO)
- Media and Digital Communications (SR-ECO-PRD)
- Visual Impact and Exhibitions (SR-ECO-VIE)

Short description of each section is provided in appendix 1.

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5. Diagnosis framework

To facilitate collection of information for the diagnosis, key main functionalities of what could compose a CRM platform for the SR Sector, have been defined. They are:

Contact Management: A centralised repository of stakeholder profiles, including individuals and organizations. It maintains contact information and key stakeholder attributes such as roles, location, affiliations, areas of engagement, and, where relevant, influence, interests, and concerns. It enables users to manage relationships, segment stakeholders, track profile changes, and maintain accurate, up-to-date information.

Interaction & Engagement History: A chronological record of interactions and activities involving stakeholders. It records logging of meetings, emails, calls, events, and other touchpoints to maintain a complete relationship timeline. It includes protocol visit's information from composition of the visit's delegation to the detailed programme

Calendar & Activity Management: A centralised record of appointments, events, visits, and tasks. It supports the planning, organization, tracking, and sharing of activities to ensure effective coordination and scheduling. It includes monitoring of actions, deadlines, progress, and follow-up activities to support timely execution and accountability.

Communication: A centralised capability for managing stakeholder communications and engagement campaigns. It supports marketing automation, email campaigns, and automated workflows triggered by events, stakeholder actions, or audience segments. It includes invitation management, RSVP tracking and monitoring, and communication performance follow-up to support targeted and effective stakeholder engagement.

Documents Repository: A centralised system of files tied to specific stakeholder-related documents like agreements, memorandums, contracts, notes, emails, meeting minutes, or reports, avoiding scattered files across emails or drives. It acts as a "single source of truth". When documents reside in other systems (e.g., SharePoint, Google Drive, or ERP), the functionality only stores links or references to those files.

Reporting-Reports Generation: A capability that generates automatically reports like briefing notes and country profiles by aggregating stakeholder data and to help in strategic discussions. Time horizon might be periodic and retrospective (quarter, semester, year, or around key events like regulatory reviews or board meetings)

Reporting-Statistics & Dashboards: A capability that generates statistics/dashboards by stakeholder type, geography, issue category, time, etc., to answer ad hoc questions. Time horizon might be real time or near real time, used continuously.)

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6. Current-State Assessment (As-Is)

6.1. Stakeholder Landscape and Typology

Stakeholders have been grouped into five main categories: Government, Research Community, Education and Networks, Socio-economic Partners, Donors, and Society and the General Public. Each category is further divided into sub-categories reflecting specific roles, functions and institutional forms.

Government actors include diplomatic representations such as embassies and consulates, public administration bodies like ministries and local authorities, as well as European and international organisations such as the European Parliament and United Nations-related entities.

The Research Community, Education and Network category encompasses universities, national laboratories, collaborations, secondary education actors such as teachers and students, as well as scientific and professional networks, including alumni networks and International Particle Physics Outreach Group (IPPOG).

Socio-economic partners are represented by industry actors ranging from multinational corporations to start-ups, alongside professional networks such as trade unions and chambers of commerce.

Donors are differentiated into public funding agencies, corporate contributors, individual philanthropists, and foundations.

Finally, **Society and the General Public** includes a broad range of stakeholders such as visitors and local communities, media and content creators, NGOs and advocacy groups, cultural initiatives including science festivals and museums, and digital or open communities such as open-source ecosystems.

Overall, the classification highlights the diversity of stakeholders engaged across institutional, economic, scientific, and societal dimensions.

The table **in appendix 2** provides an **overview of this stakeholder typology**.

6.2. Overview of the current processes

To be developed ?

6.3. Overview of the current supporting tools

Software used by Stakeholder Relations Sector

The SR Sector uses a wide range of tools to support stakeholder management activities, ranging from contact management and collaboration to document storage and reporting.

The tools differ in several aspects:

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- Internal developments or commercial solutions.
- Supporting a limited or broad range of key CRM functionalities as defined in §5.
- Purpose-built applications or generic tools (e.g., Excel) adapted to specific needs.
- Requiring licenses or available without additional licensing.

Internal solutions are generally designed to support single key CRM functionality. Collectively, however, the full set of internal tools covers all key CRM functionalities. Commercial solutions tend to provide broader functional coverage, with several supporting multiple CRM functionalities within a single tool, although some are also focused on a specific functionality.

More than 30 tools were identified through the survey[1] (See the mapping of **Current Tools to Key CRM Functionalities in appendix 3**).

Consultations with SR Sector services, conducted through interviews and a user survey, identified the following key findings regarding the CRM-related tools currently in use:

- **Most SR Sector units use tools that support at least three of the key CRM functionalities** defined in Section 5. Notably, three units—SR-SE-FP, SR-SE-PRT, and SR-ECO-PRD—use a combination of tools that collectively cover all identified CRM functionalities.
- **All SR Sector units use at least one tool supporting the Document Repository functionality**, making it the most widely adopted CRM capability across the Sector.
- In contrast, **Interaction and Engagement History is the least supported CRM functionality**, with only a limited number of units using a dedicated tool for this purpose.

These findings are supported by the user survey results, which provide a detailed **breakdown of CRM functionalities currently used by each SR unit (See appendix 4).**

Some tools play a **critical[2] role in the processes of some SR Sector units**, despite varying levels of user satisfaction. Their overview is provided in **appendix 5.**

Specific analysis of documents repository and reporting tools

Document repository

As mentioned above, all SR Sector units use at least one tool to support document repository functions, most commonly CERNBox.

There is no centralised system of Stakeholder-related documents like agreements, memorandums, contracts, notes, emails, meeting minutes, or reports. They are recorded across several document repository systems and managed by various entities at CERN, outside of the SR Sector. The main categories of stakeholder-related documents are managed in accordance with the approach described below.

- **Agreements**
  - **Collaboration Agreements** are used to define scientific and technical collaborations between CERN on the one hand, and institutes located in a CERN Member or Associate

[1] Description of the user survey in appendix 9

[2] A tool whose complete unavailability would prevent the activity from being performed, or a repository serving as the sole source of stakeholder data.

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Member State on the other hand. They are recorded on **K contracts Data Base (SHINY)** and managed by the concerned department.

- **Research and Development collaboration agreements are specific agreements** concluded with industrial partners. Their preparation is led by the IPT Department with the department concerned and the Legal Service. To be confirmed that the database is also SHINY.
- **International Cooperation Agreements (ICAs)** are used to establish a general framework for the development of scientific and technical cooperation between CERN and a non-Member State. They are recorded by the CERN legal service on **DFS**. They are managed by Stakeholder Relations Sector (the web page should be updated.).
- **Land agreements with Host State entities** ("Contrats de bail", temporary occupation, easements, land swap, CERN contributions to local projects for example) are recorded either by the Legal Service, SCE department or Host State relations section.

➢ **Memoranda of Understanding (MoU)** are used to govern CERN experiments (as listed in the Grey Book). They are non-binding legal instruments. They are prepared by the management of the Collaboration concerned, with support from the Office of the Director for Research and Computing. They are recorded on the **Grey Book Data Base**.

Reporting

Consultations with SR Sector services, conducted through interviews and a user survey, identified the following key findings regarding the specific reporting CRM functionality:

- **There is limited standardisation of reporting related to stakeholders** like official presentation, templates for briefing notes, statistics and dashboards. In addition, systematic reporting derived from operational activities and that could strengthen knowledge of stakeholders, is not mandatory. One example is duty travel report that appears as a good practice outside CERN.
- **There is no automated report generation system in place.** The survey showed that the reporting functionality in the SR Sector is primarily used for statistical analysis and dashboard creation and by a limited number of SR units. namely SR-SE-NMS, SR-SE-FP, SR-SE-PRT, SR-ECO-EDU, SR-ECO-GO, and SR-ECO-PRD. Each of these entities relies on a dedicated reporting tool tailored to its specific needs. In most cases, this consists of a CRM platform component designed to support the particular business processes of the respective SR unit.
- If there is a need to produce statistics and dashboards, **all the SR units** including these having dedicating functionalities for that, **need to collect statistics often managed outside the SR Sector**.
- **A wide range of tools is used for reporting activities**, the majority of which are commercial solutions.

Statistics: key statistics used by SR Sector unit are managed in accordance with the approach described below.

- Statistics related to personnel (staff, graduates, fellows, users) are managed by HR Department and available at BBB.

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- Statistics related to the Worldwide LHC Computing Grid (WLCG) are managed by the IT Department and available at CCC.
- Statistics related to communication (numbers related to press visits, social media statistics, web statistics) are managed by IR-ECO-PRD and produced on ad-hoc requests.
- Statistics related to protocol visits are managed by the protocol service, mainly using the dedicated functionality of VIP Visits, and are produced on ad-hoc request.
- Statistics related to Alumni are managed by SR-Eco-GO, mainly using the dedicated functionality of VIP Visit, and are produced on ad-hoc request.

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6.4. Pain points, constraints and users' adoption barriers

Pain Points

The organization faces significant challenges due to **fragmented stakeholder, administrative, and institutional data**, resulting in limited visibility of stakeholder relationships, engagement activities, commitments, influence networks, and institutional interactions.

Stakeholder Data Challenges

Stakeholder information is dispersed across multiple sources, with no single source of truth. Contacts, roles, interests, influence levels, engagement history, and commitments are not centrally managed, making them difficult to track and maintain.

This fragmentation leads to:

- Limited visibility into stakeholder relationships and activities.
- Lack of a holistic view of engagements and decisions.
- Poor traceability of interactions and commitments.
- Duplicate or uncoordinated stakeholder engagement.
- Inconsistent communication and messaging.
- Increased risk of missed commitments and follow-up actions.

Administrative and Institutional Data Challenges

Administrative and institutional information is also fragmented and decentralised. Key data such as HR and procurement statistics, institutional agreements (e.g., ICAs and MoUs), and official communication materials are stored across multiple repositories. Furthermore, there is limited standardisation for official presentations and no formal templates for briefing notes.

As a result:

- Data consolidation relies heavily on manual effort.
- Preparing reports, briefings, and presentation materials is time-consuming.
- Information is not automatically aggregated across systems.
- Reporting lacks agility, efficiency, and accuracy.

Supporting Evidence from User Survey

The challenges described above are further substantiated by a survey conducted across SR units to assess user experience with the current stakeholder management and repository/reporting tools. The results highlight recurring issues related to data quality, stakeholder tracking, information accessibility, system integration, and reporting efficiency. Detailed findings are provided in **Appendix 6: User Survey Findings by Functionality.**

Overall, the current ecosystem of tools suffers from fragmented information, limited integration, and data quality challenges. These issues reduce the efficiency of stakeholder management processes, complicate engagement tracking, and increase the effort required to produce reliable

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reports, reinforcing the need for a centralised and integrated stakeholder relationship management solution.

Constraints

The key constraints identified through stakeholder consultations, including interviews and survey responses, and which should be considered when designing and implementing a future CRM platform, are outlined below.

- Need to collaborate outside SR Sector with other CERN entities
- Need to maintain confidentiality of stakeholder information
- Existing repositories (CERNBox, EDMS, CDS) already in place
- Linking the future platform with the existing systems is a challenging aspect considering legacy infrastructure.
- Limited resources available for administration and maintenance
- Need for a safe migration process and data backup

User Adoption Barriers

Teams could resist a future system due to complex interfaces and perceived administrative burden, especially considering that the tools they currently use are almost satisfactory.

Reduced involvement of the future end users in the project and inadequate training of the future platform, would result in low usage rates and reliance on the future platform.

It is worth mentioning that colleagues mentioned fear of losing historical data.

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7. Future-State Requirements (To-Be)

The key CRM functionalities identified for this assessment represent the core capabilities required to manage stakeholder information, interactions, engagement activities, and institutional records effectively. These functionalities have been grouped into two main areas: **Stakeholder Management** and **Records and Reporting Management**, which are described below. The results of the user survey assessing future business needs are presented in **Appendix 7**.

Must-Have

The below capability as enounced in §3.2 applies to all functionalities.

- The ability to **securely migrate historical stakeholder data from legacy systems**, ensuring continuity, data integrity, and the preservation of institutional knowledge within the future platform.

7.1. Stakeholder Management functions

Contact Management maintains centrally stakeholders' profile, individuals, organisations, communities, with contact details such as roles, location, affiliations, areas of engagement, and, where relevant, influence, interests, and concerns.

Must-Have

The functionality should enable users to:

- Share stakeholder information across teams
- Coordinate stakeholder interactions across teams
- Maintain complete stakeholder profiles
- Segment and organizing stakeholders for targeted activities
- Ensure compliance and record-keeping track profile changes, and maintain accurate, up-to-date information.

Nice-To-Have

- The ability to link administrative and institutional data directly to stakeholder records.
- Designate a data owner

Additional comment: The user survey confirmed the importance of having all the above capabilities for supporting SR Sector operational work (see appendix 7, more than 2/3 of the survey respondents considered these capabilities as critical or important).

Interaction and Engagement History maintains a centralised, chronological record of stakeholder interactions and engagement activities, It captures logging of meetings, visits, phone calls, emails, events, and other touchpoints It includes protocol visit's information from composition of the visit's delegation to the detailed programme.

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Must-Have

The functionality should enable users to:

- Record and track meetings, visits, events, calls, emails, and other stakeholder interactions
- Capture interaction details, including dates, participants, topics discussed, decisions made, and sensitivity level
- Maintain internal notes, briefings, and engagement records
- Track action items, and follow-up activities
- Manage protocol visit information, including delegation details and visit programmes

Nice-To-Have

- Tracking of mass communication activities (e.g., press releases, public statements, newsletters)
- Capture of survey or stakeholder feedback responses

Calendar A activity Management maintains a centralised record of appointments, meetings, events, visits, and tasks, enabling effective planning, scheduling, coordination, and tracking of activities across teams.

Must-Have

The functionality should enable users to:

- Schedule and coordinate appointments, meetings, events, and visits
- Manage agendas and tracking action items and follow-up activities
- Share calendars and activity information across teams
- Send automated notifications, alerts, and reminders for upcoming activities, deadlines, and pending actions
- Manage agendas and track action items and follow-up activities

Nice-To-Have

- Resource booking
- Approval workflows

Communication supports a comprehensive set of communication and engagement capabilities, including centralised email management, marketing automation, email campaigns, newsletters, automated workflows triggered by events, stakeholder actions or audience segments, as well as event communication processes such as invitation management, RSVP tracking and event's attendance tracking using QR code for example.

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Must-Have

The functionality should enable users to:

- Manage personalised communications including sending one-to-one emails
- *Support event-related engagement over broader marketing campaign functionality.*
- Send event invitations and track RSVPs and event's attendance tracking using QR code for example
- Have the capability to merge emails

Nice-To-Have

- Email campaigns
- Segmented campaigns
- Newsletters
- Reminder emails
- Follow-up emails
- Personalised communication template
- Workflow automation

7.2. Records and Reporting Management functions

Documents Repository centralises files tied to specific stakeholder-related documents like agreements, memorandums, contracts, notes, emails, meeting minutes, or reports, avoiding scattered files across emails or drives. It acts as a "single source of truth". When documents reside in other systems (e.g., SharePoint, Google Drive, or ERP), the functionality only stores links or references to those files.

Must-Have

The functionality should enable users to in order of importance:

- User-friendly, and rapid access to administrative and institutional data.
- Be able to search documents and attachments
- Link documents stored in other systems
- Export reports to common formats (PDF, Word, Excel, PowerPoint)
- Centralise storage of stakeholder-related documents
- Document categorization and tagging
- Aggregate stakeholder data from multiple sources

Nice-To-Have

No items

Additional comment: the user survey indicated that **Centralised Duty travels debriefs and Standardized report templates** are lower-priority requirements

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Reporting

Reporting-Reports Generation generates executive reports like briefing notes and country profiles by aggregating stakeholder data and to help in strategic discussions. Time horizon might be periodic and retrospective (quarter, semester, year, or around key events like regulatory reviews or board meetings).

Reporting-Statistics & Dashboards generates statistics/dashboards by stakeholder type, geography, issue category, time, etc., to answer ad hoc questions. Time horizon might be real time or near real time, used continuously.

Must-Have

The reporting functionality (Generation **of executive reports** and **Generation of statistics and dashboards)** should enable users to generate, in order of importance:

- Meeting preparation dossiers
- Meetings and visits statistics
- Interactive dashboards and visual analytics
- Dashboards per country, stakeholders, industry
- Emerging issues and trends
- Reports such as briefing notes
- Stakeholder influence/priority analysis

Nice-To-Have

- Ad hoc analysis and query capabilities
- Trend analysis over time

7.3. Usability requirements

To ensure the platform will be user-friendly, efficient, and effective, the below requirements should be assessed with the support of the end-users.

- Intuitive user interface
- Classification
- Attachments
- Links
- Import
- Sharing
- Customization of roles and access levels
- Workflows covering approval process, assignment of tasks and reminder/alert
- Automation enhancing harmonisation (searchable, retrievable lists, automatic checks)
- Logs
- Mobile access

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8. Conclusion

Among the 14 SR Sector units, not all use all six key CRM functionalities as defined in chapter 5. Where functionalities are used, adoption varies from a limited set of features to broad use of key functionalities, often relying on different tools.

As a result, the challenges identified through the interviews and user survey do not necessarily reflect the challenges experienced across the entire SR Sector.

Similarly, not all units consider all CRM functionalities to be a top priority for the future. Based on the user survey (Appendix 7), **Contact Management** and a **Document Repository** appear to be the most important functionalities across all units and would provide significant support to their work.

The importance of the remaining functionalities varies depending on the units' existing tools, their level of satisfaction with those tools, and the nature of their missions, which may require varying degrees of application support.

Therefore, a reasonable and pragmatic approach would be to prioritize the implementation of **Contact Management** and a **Document Repository** as core capabilities, while offering the other functionalities as optional modules that can be adopted according to each unit's specific needs.

A synthesis of the full analysis is provided in appendix 8.

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Appendix 1 Description of SR Sector sections

European Union and International Organisations Relations

The mission of this service is to develop and maintain CERN's strategic relationships with the European Union, international organizations, and key multilateral partners. It ensures that CERN remains closely connected to the global scientific, policy, and innovation landscape while supporting the Organization's international engagement and visibility.

Partnerships and Fundraising

The Partnerships and Fundraising Section coordinates and conducts fundraising activities for CERN and the CERN & Society Foundation. It is responsible for promoting and ensuring compliance with CERN's fundraising standards, including the Ethical Policy and the Policy for the Recognition of Donors. Through the CERN & Society Foundation, established in 2014, the section facilitates philanthropic support from companies, foundations, trusts, and individuals to advance CERN & Society projects.

Host State Relations

The Host State Relations Service manages CERN's relationships with the French and Swiss authorities, contributing to the effective functioning of the Organization. Its activities cut across CERN's concerned services / departments (SCE, Legal service, HR, EP, Security service) and cover a wide range of operational and administrative matters mainly relating to CERN domain (land issues) customs matters, local affairs, and visas and residence-related issues.

Non-Member State Relations

The Non-Member State Relations Section manages CERN's relationships with countries that are not CERN Member States, including Observer States and recently acceded Associate Member States. It supports their integration into CERN activities and contributes to CERN's international influence, scientific cooperation, and geographical enlargement strategy.

Member and Associate Member States Relations

The Member and Associate Member States Relations Section coordinates matters concerning CERN's relationships with its Member States and Associate Member States. Its mission is to ensure effective dialogue, facilitate institutional cooperation, and support stakeholder engagement with CERN's governance and activities.

Protocol

The Protocol Office supports the CERN Directorate in the management of high-level official visits and ceremonial events. It coordinates visits by heads of state, government representatives, ministers, ambassadors, heads of international organizations, and parliamentary delegations, while also contributing to major institutional events, anniversaries, and celebrations linked to significant scientific milestones.

FCC Territorial Implementation

The FCC Territorial Implementation Section supports the preparation of the Future Circular Collider (FCC) project by coordinating the territorial, regulatory, environmental, and institutional

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processes required in CERN's Host States, France and Switzerland. It serves as the interface between the FCC project and the national, regional, and local authorities whose cooperation and approvals are essential for the project's realization.

Translation, Minutes and Council Support

The Translation, Minutes and Council Support Section houses the Council Secretariat, which supports CERN's governing bodies and contributes to the Organization's institutional governance. The section also provides multilingual communication support, prepares and maintains official records, and ensures the documentation of CERN's institutional activities.

Education

The mission of the Education Service is to provide high-quality science education opportunities for learners of all ages, with particular emphasis on students, teachers, and STEM educators. The service promotes understanding of particle physics, scientific inquiry, and CERN's research through a wide range of educational programmes and resources.

Global Outreach

Global Outreach advances CERN's mission by strengthening international engagement and extending the Organization's impact beyond fundamental research. Bringing together the CERN Alumni programme and Arts at CERN, the section builds long-term relationships, enhances institutional visibility, and fosters cross-sector dialogue.

Local Outreach

The Local Outreach Service strengthens CERN's engagement with local communities and stakeholders in the Host States. It promotes dialogue, builds understanding of CERN's mission and activities, and develops initiatives that foster positive relationships with local audiences.

Content

The Content section produces and publishes all forms of content for CERN's main communication channels and audiences, showcasing and generating engagement with the Organisation's activities and achievements, including its research and technology programmes, its impact on society and its future projects.

Media and Digital Communications

The Media and Digital Communications Section develops and implements CERN's external media and digital communications strategy. It ensures that CERN's scientific achievements, institutional messages, and activities reach global audiences through a broad range of traditional, digital, and social media channels.

Visual Impact and Exhibitions

The mission of the Visual Impact and Exhibitions Service is to translate CERN's science, technologies, and institutional identity into engaging visual, interactive, and exhibition experiences. Through exhibitions, design, and storytelling, the service strengthens public awareness of CERN and its contribution to science and society.

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Appendix 2-Typology of stakeholders

Categories	Sub-categories	Examples
Government	Diplomatic representations	Embassy, Consulate, Permanent mission,
	Public administration	Ministry, Public services, Local/territorial authority, elected officials
	Europe and International Organisations	European Parliament, EIROforum Organisation, UN Organisations,
Research Community, Education and Network	Research community	National Laboratory, Collaboration, Institute, University,
	Secondary education	Teachers, Students, Youth Associations, Local Science club,
	Networks	Alumni, IPPOG, EPPCN,
Socio-economics partners	Industry and business	Multinational, SME, Start-up,
	Professional network	Professional federation, commerce chamber, trade unions,
Donors	Public donors	Funding Agencies, Institutions
	Corporate donors	Companies
	Individual donors	High-Net-Worth Individuals, General, Legacy
	Foundations	Philanthropic, Corporate
Society and the General Public	General Public	Visitors, tourists,
	Local and civic communities	Local communities, civil society group,
	Media and content creators	International media, specialised media, Local media, Influencers & Social media creators, Documentary producers
	NGOs, Advocacy and activist groups	International NGOs, Associations and cooperatives (environmental, agricultural, others),
	Cultural activities	Summit, Science week, museum, Artists, Festivals.
	Digital and open communities	Open-source Community, Wordpress Community

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Appendix 3- Current Tools to Key CRM Functionalities

Internal Solutions	Contact Management	Interaction & Engagement History	Calendar and activity Management	Communication	Document Repository	Reporting
Alumni DB (Oracle HR)						
COUNCIL Secretariat mailing list						
VIP event						
FileMakerPro						
VIP Visits						
OUTREACH						
E-groups						
CDS						
CERNBox						
Physical Paper File						
DFS						
INDICO						

Internal solutions are generally designed to support single key CRM functionality.

Collectively, the full set of internal tools covers all key CRM functionalities.

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Commercial Solutions	Contact Management	Interaction & Engagement History	Calendar and activity Management	Communication	Document Repository	Reporting
Actito						
Alumni.cern (Hivebrite),						
CISION						
CiVi						
iRaiser						
Odoo						
ASANA						
Excel						
Outlook						
Shared Apple calendar						
TRELLO						
Meister Task						
Notion						
Alpha Galileo						
SIGNAL						
Social Media						
SPOTLER						
Google Drive/Google docs						
SharePoint						
Meltwater						
Python scripts						
TVEyes						

Commercial solutions tend to provide broader functional coverage, with several supporting multiple CRM functionalities within a single tool

Appendix 4- Breakdown of Key CRM Functionalities Used by SR Unit

Key CRM Functionalities	SR-SE-EUI	SR-SE-HSR	SR-SE-MS	SR-SE-NMS	SR-SE-FP	SR-SE-PRT	SR-SE-TI	SR-SE-TMC	SR-ECO-EDU	SR-ECO-GO	SR-ECO-LO	SR-ECO-PRD	SR-ECO-VIE
Contact Management	0	Y	0	0	Y	Y	Y	0	0	Y	0	Y	0
Interaction & Engagement History	0	Y	0	0	Y	Y	Y	0	0	0	0	Y	0
Calendar & Activities Management	0	0	0	Y	Y	Y	Y	Y	Y	Y	Y	Y	0
Communication	0	0	0	Y	Y	Y	Y	Y	Y	Y	0	Y	0
Document Repository	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Reporting- Reports Generation and statistics	0	0	0	Y	Y	Y	0	0	0	Y	0	Y	0

Most SR Sector units use tools that support at least three of the key CRM functionalities

All SR Sector units use at least one tool supporting the Document Repository functionality

Interaction and Engagement History is the least supported CRM functionality

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Appendix 5- Description of current used tools playing a critical role

CiVi CRM - Contact Relationship Management system.

In CiVi Partnerships and Fundraising keeps track of its stakeholder, their donor cycle status, current state of the relationship, next actions, history of actions, history of donations, profiles, approaches, and much more Each contact is associated with a unique ID number; the ID number cannot be modified and every other information inserted in the system refers to this.

iRaiser - a cloud-based Software-as-a-Service (SaaS) platform designed for nonprofit organisations and charities to collect donations and manage digital fundraising campaigns.

Its core functions include creation of custom online donation forms, set up of separate campaigns, supporters' engagement, collection and management of donations, report extraction. Each contact is associated with a unique ID number, and the systems uses email addresses as second form of identification, to avoid contact duplication.

Actito - cloud-based marketing automation and customer engagement platform.

With Actito the PF can create email campaigns to keep engagement with donors and potential donors. The core functions of the platform are marketing automation, multichannel engagement and prospect/donor data management. It allows a more detailed segmentation of the audience, to build automated journeys and trigger messages based on events or time intervals. The PF uses this tool for its emailing capabilities, and it can be integrated with SMS, push notifications and WhatsApp. Each donor is linked to a unique ID number and, when synced from a CMR, a customer number is added to the profile.

VIP Visits- a FAP-BC database listing all heads of delegation and accompanying party attending a visit or an event organised by the Protocol Office since 1960.

VIP Events- A FAP-BC contact list database enabling the management of invitations to dedicated group of stakeholders to large-scale events organised by the Protocol Office since September 2014.

OUTREACH (from end of 2026: Visits Agenda) – a FAP-BC agenda scheduling tool centralizing the visits from different stakeholders (Visits Service, Press office, Protocol office, Experiment secretariats) and providing reporting on visitors.

SE CERNBox- a file storage, such as *briefing notes, official letters, and relevant Council documents*. It is cloud based and structured in 6 folders representing each SR-SE section +an URL sharing the DG official Travels. **Important: it does not integrate folders related to the SE-ECO (Education, Communications and Outreach) group.**

MS Dashboard- an excel file that keeps track for each MS, of the essential features such as Date of entry as MS, name of the permanent mission representative, name of the Council delegates, pressing issues relevant to CERN…

HSR Claris FileMaker Pro - is a commercial database used to manage HSR activities on a per-file ("dossier") basis. It is structured into topical areas organized across 32 categories. The tool

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enables efficient management of activities, quick retrieval of information, and full traceability. It also supports the generation of statistics and reports.

HSR CERNBox and HSR-Paper file-: HSR stores the final versions of documents referenced in HSR FileMaker Pro within a project CERNBox electronic storage system, "host-state-relations-doc", and in physical paper files. A structured document hierarchy (arborescence) provides access to the relevant records, which may include correspondence, scanned agreements, meeting minutes, memos, and other supporting documentation. Documents in progress and final documents relating to visas applications are shared in two separate project CERNBoxes.

Hivebrite - a cloud-based Software-as-a-Service (SaaS) platform which is designed to support the management and engagement of online communities, including alumni networks and membership-based organisations.

Its core functionalities include user profile management, member directory and segmentation, event creation and registration, content publishing, a media centre, mentoring programmes, a jobs board, engagement tracking and communication tools such as newsletters and targeted messaging. A central feature of the platform is its group functionality, which enables the creation of thematic, regional, or interest-based communities where members can interact, share content, and build connections through discussions and networking. The interface also offers an analytics module for reporting and statistical purposes.

Apple email inbox: application used by Press office for day-to-day operation.

Efficy: main functionalities are contact management and potentially, marketing campaigns automation and reporting dashboards.

CISION: database for journalists and media monitoring. The tool allows sending CERN press releases and media invitations. It also allows to do media monitoring and reporting.

Odoo- is a modular, open-source ERP/CRM software suite available as a SaaS solution. Its CRM module covers contact and organization management, as well as interaction tracking. The Studio module enables no-code customization, allowing users to create custom fields and models, define closed selection lists, configure conditional fields, and implement simple automation rules. Its modular architecture allows additional applications—such as Projects, Events, and Email Marketing—to be activated progressively as needs evolve, all within a unified interface. As a general-purpose business management solution, Odoo meets standard CRM requirements; more specialized use cases, such as institutional relationship management or advanced stakeholder qualification, require additional configuration or complementary tools.

Table in appendix 1 summarizes the main functionalities of these tools/support versus "key requirements" as described in § 8 of this document.

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Appendix 6: User Survey Findings by Functionality

Contact Management

The current contact management landscape comprises a range of tools, including Hivebrite for alumni management, Oracle HR as the alumni database, Odoo, VIP Events, CiviCRM, Cision, iRaiser, and the Council Secretariat mailing list, which is maintained as a Word document hosted on a website.

End users expressed dissatisfaction with Odoo, CiviCRM, and the Council Secretariat mailing list tool. Across the contact management ecosystem, **the most frequently reported challenges are:**

- **Duplicate and inconsistent data**
- **Difficulties locating relevant information**
- **Limited capabilities for tracking stakeholders and maintaining up-to-date profiles.**

In addition to these common issues, users also highlighted several tool-specific pain points.

It is important to note that only six SR organic units currently use dedicated contact management tools, representing approximately half of the SR units. **Therefore, the challenges and pain points identified reflect the experiences of this subset of users (half of SR units) and may not fully represent the needs and experiences of the entire SR Sector.**

Despite the relatively limited current adoption, **the assessment of future needs reveals strong interest in a centralised contact management solution.** A majority of SR organic units indicated a willingness to adopt such a platform, suggesting a clear opportunity to improve stakeholder management, data quality, and cross-unit collaboration through a common solution.

Interaction & Engagement History

Users reported challenges in maintaining a complete and accurate record of stakeholder engagements:

- Interaction history is incomplete or missing information.
- Engagement records are not updated in real time.
- Limited stakeholder tracking capabilities.
- Difficulty understanding stakeholder engagement history across multiple communication channels.
- Inadequate search and filtering capabilities.

It is important to note that only five SR organic units currently use dedicated contact management tools, representing less than half of the SR units. **Therefore, the challenges and pain points identified reflect the experiences of this subset of users (less than half of SR units) only.**

Calendar and Activity Management

The current calendar and activity management landscape includes several tools, most notably Outlook and OUTREACH, which were referenced multiple times, as well as ASANA, Odoo, Trello, and a shared Apple Calendar.

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While no clear pattern of satisfaction or dissatisfaction emerged for any specific tool, **a common challenge was consistently identified across the ecosystem: integration difficulties with external calendar and meeting platforms.**

It is also important to note that only three SR organic units reported not using Calendar and Activity Management tools, indicating that **Calendar and Activity Management solutions are widely adopted across the SR Sector.**

Communication

The current communication landscape includes only four mentioned tools, VIP events, Hivebrite, CiVi CRM and Odoo.

The recurrent challenges raised by the users of these applications are:

- **Limited tracking of stakeholder interactions**
- **Difficulty finding information**
- **Duplicate or inconsistent data**

Document Repository

All SR organic units reported using repository management tools. The current repository management landscape comprises a variety of solutions, with CERNBox being the most widely used, alongside Odoo, DFS, CDS, Indico, SharePoint, Google Drive, Google Docs, Civi, and e-groups used by the Council Secretariat. In some cases, paper-based records are also maintained.

The most frequently reported challenge is that stakeholder-related documents are dispersed across multiple repositories and storage locations, making information retrieval, document management, and version control difficult.

While CERNBox is widely used and generally valued as a document repository, users highlighted several limitations, including the limited ability to link documents directly to stakeholder records and occasional accessibility issues when connecting from outside CERN.

User satisfaction varies across the different tools. While most solutions are generally considered fit for purpose, end users reported particular dissatisfaction with Odoo, CiviCRM, and the Council Secretariat mailing list management tool.

Reporting

Reporting activities currently rely on a broad range of tools, including Hivebrite, CISION, CiVi, Excel, Meltwater, VIP Visits, TVEyes, Python scripts, and social media analytics tools.

Reporting functionality is used by only six SR units, one of which relies exclusively on Excel. Overall satisfaction with the reporting tools is relatively positive. However, users identified several recurring challenges:

- **Time-consuming report preparation.**
- **Data quality issues affecting reporting accuracy and consistency**.

It is also noteworthy that most users of these reporting capabilities belong to dedicated functions responsible for producing statistics and analytical reports.

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Appendix 7-1 User Survey results related to the future needs

	How important would the following capabilities be for supporting your work?	Critical & Important
Contact Management	Maintaining accurate and up-to-date stakeholder information	26
	Sharing stakeholder information across teams	22
	Coordinating stakeholder interactions across teams	21
	Maintaining complete stakeholder profiles	23
	Segmenting and organising stakeholders for targeted activities	21
	Compliance and record-keeping	26
Interaction & Engagement History	Meeting, events, visits, Phone calls traceability (date, participants, topics, decisions, sensitivity)	24
	Internal notes or briefings	23
	Actions monitoring	24
	External communications (e.g., press releases, public statements)	13
	Surveys or feedback responses	15
Calendar & Activity Management	Appointment and meeting scheduling	22
	Resource booking	15
	Agenda management	19
	Approval workflows	16
	Notifications and reminders	22
Communication	One-to-one emails	22
	Email campaigns	11
	Newsletters	15
	Event invitations	23
	RSVP monitoring	16
	Reminder emails	18
	Follow-up emails	20
	Personalized communication templates	18
	Mail merge	22
	Workflow automation	18
	Segmented campaigns	12
Document Repository	Centralized storage of stakeholder-related documents	24
	Document categorization and tagging	24
	Centralised Duty travels debriefs	13
	Exporting reports to common formats (PDF, Word, Excel, PowerPoint)	25
	Aggregation of stakeholder data from multiple sources	21
	Standardized report templates	18
	Ability to search documents and attachments	28
	Linking documents stored in other systems	26
Reporting	Generation of reports such as briefing notes	19
	Meeting preparation dossiers	23
	Stakeholder influence/priority analysis	19
	Interactive dashboards and visual analytics	22
	Emerging issues and trends	20
	Ad hoc analysis and query capabilities	15
	Meetings and visits statistics	23
	Trend analysis over time	18
	Dashboards per country, stakeholders, industry	22

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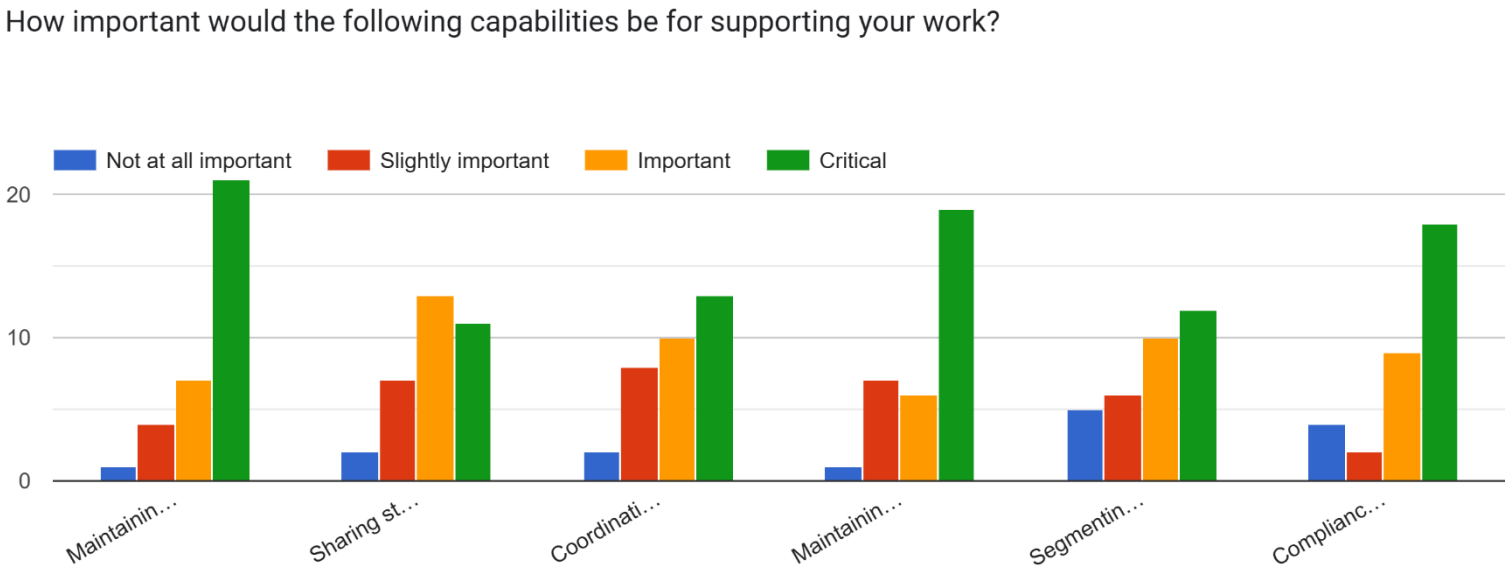
Appendix 7-2 User Survey results related to the future needs

Contact Management



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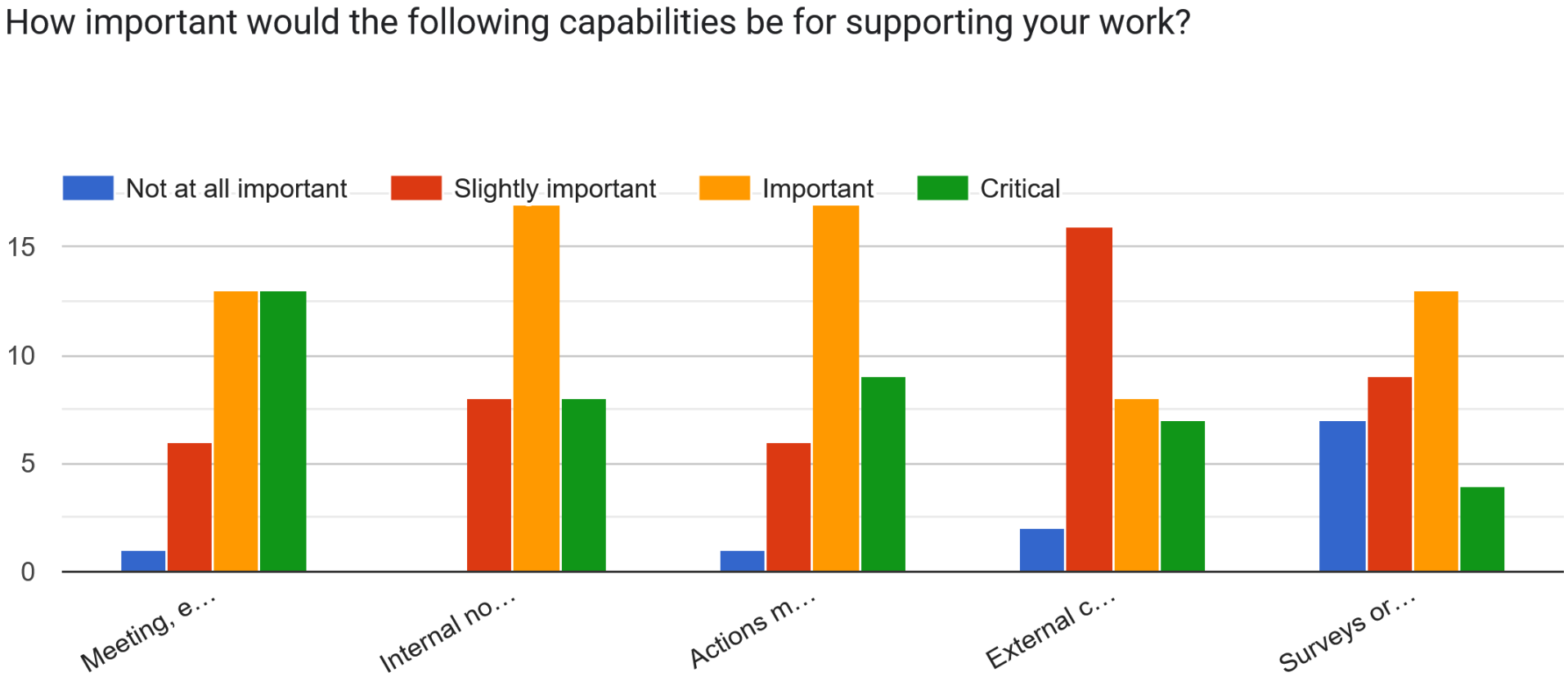
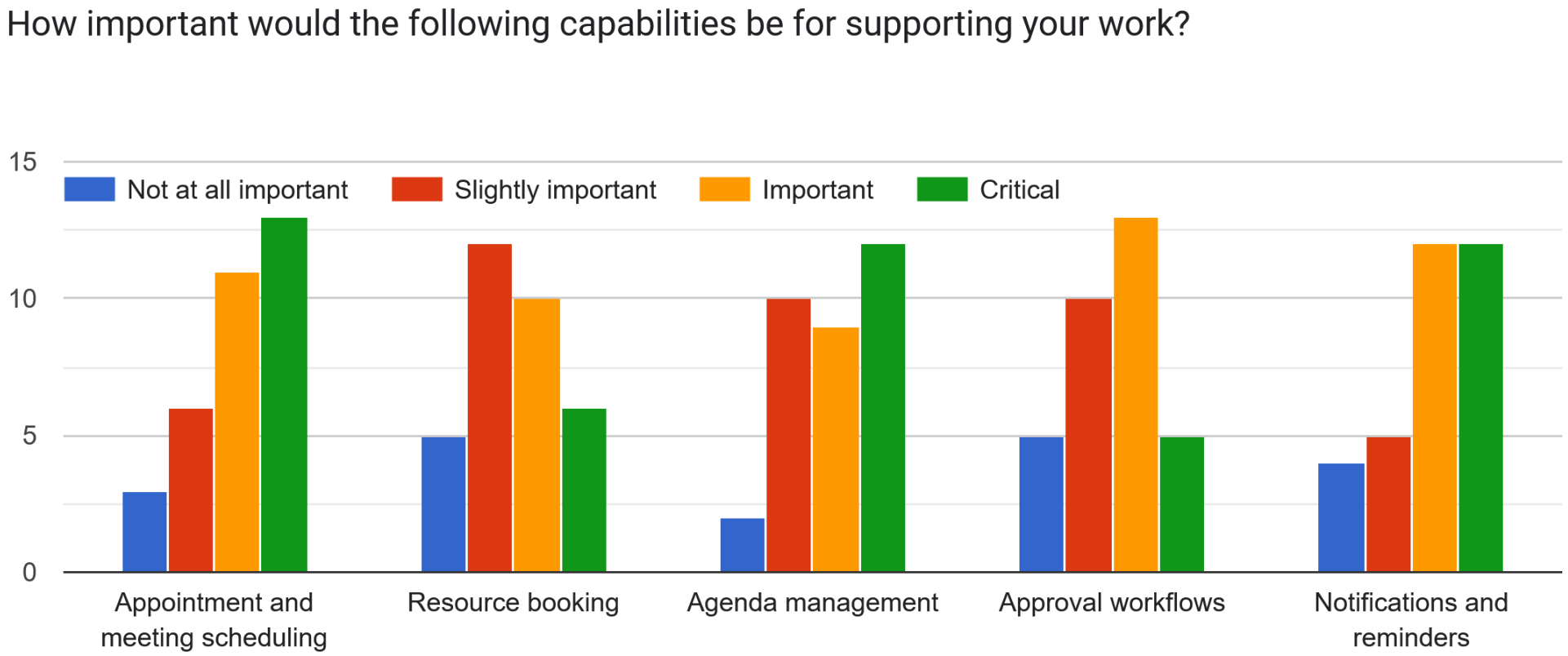
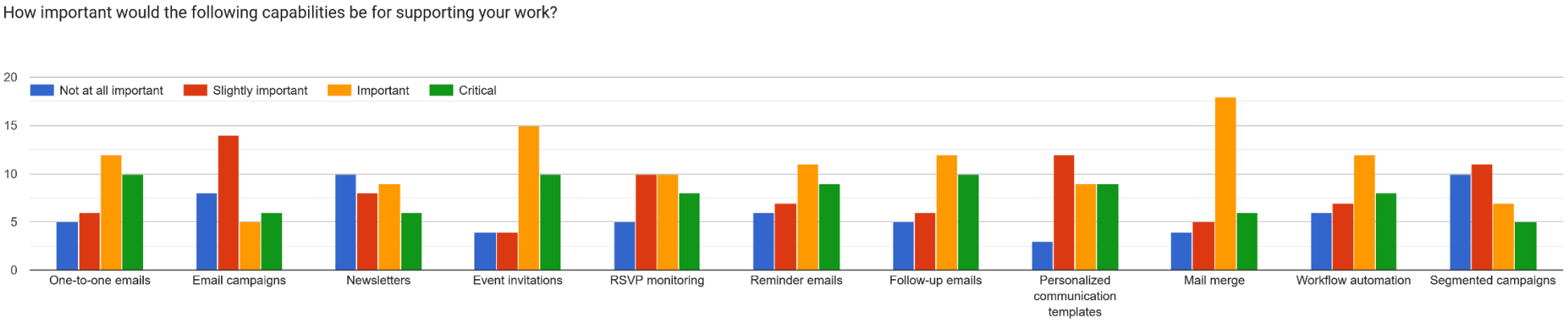
Interaction and Engagement History



Calendar and Activity Management



Communication



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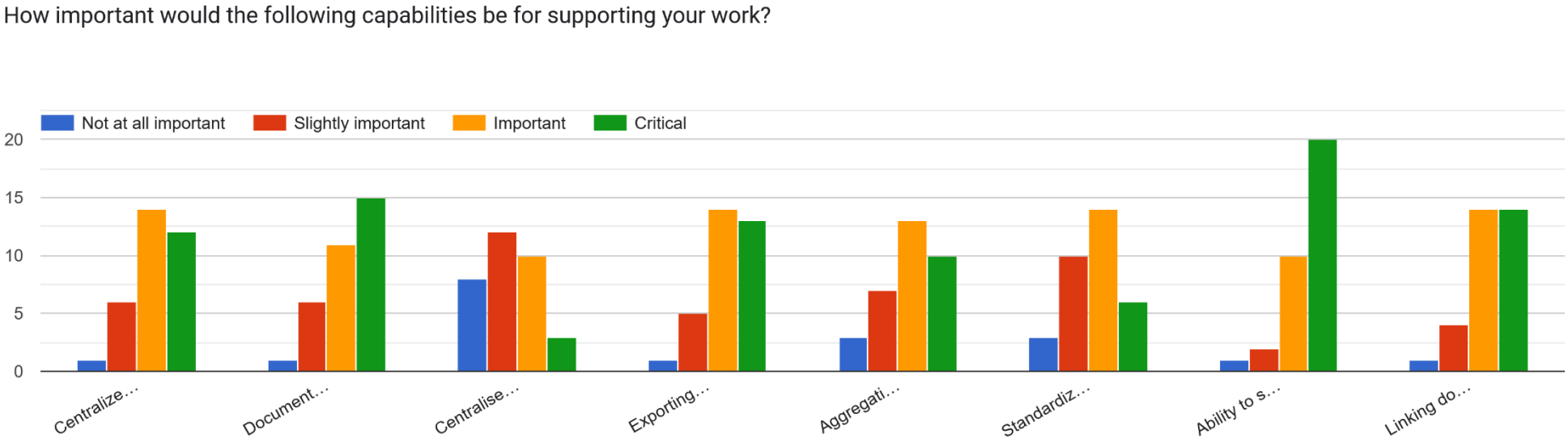
Document Repository



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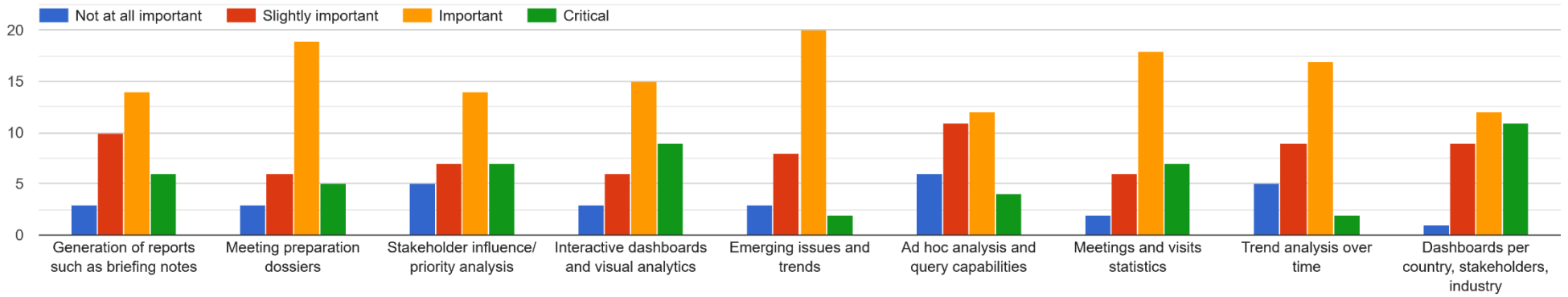
Reporting

How important would the following capabilities be for supporting your work?



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Appendix 8-Synthesis of the analysis

Functionality	Challenges	Scope of use	Development Options	Must-Have	Nice-To-Have
Contact Management	**Duplicate** and inconsistent data **Difficulties** locating relevant information **Limited** capabilities for tracking stakeholders and maintaining up-to-date profiles.	6 units	**Use VIP Events** as a basis. *Possible pilot (asking additional SR Sector units to use it)* **Procure a new** commercial platform	**Share** stakeholder information across teams **Coordinate** stakeholder interactions across teams **Maintain** complete stakeholder profiles **Segment** and organizing stakeholders for targeted activities **Ensure** compliance and record-keeping track profile changes, and maintain accurate, up-to-date information.	**The ability** to link administrative and institutional data directly to stakeholder records **Designate** a data owner
Interaction & Engagement History	**Interaction history** is incomplete or missing information. **Engagement** records are not updated in real time. **Limited** stakeholder tracking capabilities. **Difficulty** understanding stakeholder engagement history across multiple communication channels. **Inadequate** search and filtering capabilities.	5 units	**Procure** a new commercial platform *Extending VIP events does not seem an optimised option as this functionality requires many more items to be added. It is different from "Contact Management" above that is simpler, basic.*	**Record** and track meetings, visits, events, calls, emails, and other stakeholder interactions **Capture** interaction details, including dates, participants, topics discussed, decisions made, and sensitivity level **Maintain** internal notes, briefings, and engagement records **Track** action items, and follow-up activities **Manage** protocol visit information, including delegation details and visit programmes	**Tracking** of mass communication activities (e.g., press releases, public statements, newsletters) **Capture** of survey or stakeholder feedback responses

Functionality	Challenges	Scope of use	Development Options	Must-Have	Nice-To-Have
Calendar & Activity Management	Integration difficulties with external calendar and meeting platforms.	All units, except 3	**Procure** a new commercial platform despite the existence of OUTREACH (CERN application) that offers limited functions compared to "Must-Have"	**Schedule** and coordinate appointments, meetings, events, and visits **Manage** agendas and tracking action items and follow-up activities **Share** calendars and activity information across teams **Send** automated notifications, alerts, and reminders for upcoming activities, deadlines, and pending actions **Manage** agendas and track action items and follow-up activities	**Resource** booking **Approval** workflows
Communication	**Limited** tracking of stakeholder interactions **Difficulty** finding information **Duplicate** or inconsistent data	8 units	**Review the need** related to this functionality in connection with the other ones. The needs might be integrated by the other functions	**Manage** personalised communications including sending one-to-one emails **Support** event-related engagement over broader marketing campaign functionality. **Send** event invitations and track RSVPs and event's attendance tracking using QR code for example **Have** the capability to merge emails	**Email** campaigns **Segmented** campaigns **Newsletters** **Reminder** emails **Follow-up** emails **Personalised** communication template **Workflow** automation

Functionality	Challenges	Scope of use	Development Options	Must-Have	Nice-To-Have
Documents Repository	Stakeholder-related documents are dispersed across multiple repositories and storage locations, making information retrieval, document management, and version control difficult.	All units	**Procure** a new commercial platform despite the existence of CERNBox that offers limited functions compared to "Must-Have	**Be able** to search documents and attachments **Link** documents stored in other systems **Export** reports to common formats (PDF, Word, Excel, PowerPoint) **Centralise** storage of stakeholder-related documents **Document** categorization and tagging **Aggregate** stakeholder data from multiple sources	No items but the user survey indicated that Centralised Duty travels debriefs and Standardized report templates are lower-priority requirements
Reporting	Time-consuming report preparation. Data quality issues affecting reporting accuracy and consistency.	6 units	**Procure** a new commercial platform	**Meeting** preparation dossiers **Meetings** and visits statistics **Interactive** dashboards and visual analytics **Dashboards** per country, stakeholders, industry **Emerging** issues and trends **Reports** such as briefing notes **Stakeholder** influence/priority analysis	**Ad hoc** analysis and query capabilities **Trend** analysis over time

Appendix 9-Description of the user survey

A user survey was conducted to validate and consolidate the initial findings highlighted after a series of interviews with people primarily from the SR Sector, but also from other CERN entities. The purpose of the survey was to identify current pain points, desired capabilities, and priority requirements for a centralized stakeholder management platform
The target respondents were the SR Sector management (SR Head, SR Group Leaders and all SR Section Leaders and Team Leaders) plus other people who are using IT tools/applications integrating CRM functionalities.

Over 47 recipients, 31 people, responded to the survey.

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