



# Customer Update & Roadmap Review

Upcoming Enhancements, Tips and Reminders

December 2021

Eddie Neuwirth – Sr. Director, Product Management





THANK YOU



# Agenda

- ...A few words about Clarivate and the future of Pivot-RP
- Key Contacts
- 2021 Accomplishments & Roadmap Review
- What's New? – Coming Soon
  - [December Release Notes](#)
- Training Resources Updates
- Q&A



# Clarivate Completes Acquisition of ProQuest

**London, December 1, 2021**—Clarivate plc (NYSE: CLVT), a global leader in providing trusted information and insights to accelerate the pace of innovation, has completed its acquisition of ProQuest – a leading global software, content, data and analytics provider. This succeeds the satisfaction of customary closing conditions, following a commitment to acquire the business from the Cambridge Information Group and other investors, announced on May 17, 2021.

[Read the press release](#)

[https://bit.ly/Pivot-RP\\_Clarivate\\_Press](https://bit.ly/Pivot-RP_Clarivate_Press)



ProQuest.  
Part of Clarivate

ExLibris.  
Part of Clarivate

# No Changes to the Way We Work

## Same Great Team Behind Pivot-RP



**Committed as always to enhancing  
Pivot-RP and supporting your needs**



**ExLibris**  
Part of **Clarivate**



# Exciting Opportunities for Enhancing Pivot-RP

 **Clarivate™**



**FAQs**

[https://bit.ly/Pivot-RP\\_Clarivate\\_FAQ](https://bit.ly/Pivot-RP_Clarivate_FAQ)

By bringing together these two customer-focused businesses with a shared goal of accelerating innovation at their core, the combination of Clarivate and ProQuest creates a world-leading software and information provider for research-focused organizations to fuel scientific discovery, knowledge sharing and accelerate innovation into the future.

**Clarivate will continue to invest in both existing product portfolios and looks forward to pursuing multiple product and data integration opportunities.**

# Committed to our Pivot-RP Roadmap and Growth Plan

Integration work wrapping up in H1 2022

**Pivot** + **Research  
Professional**

August 6, 2018

Ex Libris Acquires Research Research Ltd., Industry Leader in the Coverage of Research Funding Opportunities, News, and Analysis

**ExLibris**  
**Pivot-RP**

- Expanded editorial and development teams
- Increased funding opportunities and global coverage of sponsors
- Launched new User Experience
- Improved speed, accuracy and indexing of data
- Developed new features and functionality
- [www.researchprofessionalnews.com](http://www.researchprofessionalnews.com)

# 2022 Primary Product Focus



- Growing our Global Customer Community
- Customer Driven Enhancements & Innovation
- Improved Customer Support & Resources



# Key Contacts: We'd Love to Hear from You



**Eddie Neuwirth**

Sr. Director of Product Management  
eddie.neuwirth@exlibrisgroup.com



**Robert J. Laurie**

Customer Success Manager –  
North America  
robert.laurie@exlibrisgroup.com



**Lotte Krause**

Product Manager,  
Pivot-RP & Research Professional  
Lotte.Krause@exlibrisgroup.com



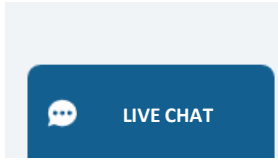
**Sofia Vilja**

Client Services Team Leader  
EMEA and ANZ  
Sofia.Vilja@exlibrisgroup.com

# Customer Support Options



<https://supportcase.exlibrisgroup.com/s/pivot>



Live Chat support available!



<https://knowledge.exlibrisgroup.com>

# 2021 Highlights

## Pivot-RP By the Numbers

# Customer Community is Growing

## Second Annual User Group

*May 2021*

112 Live Attendees/232+ Registered

Already  
planning  
for  
2022!

User Group Recordings

<https://bit.ly/3In2UsS>



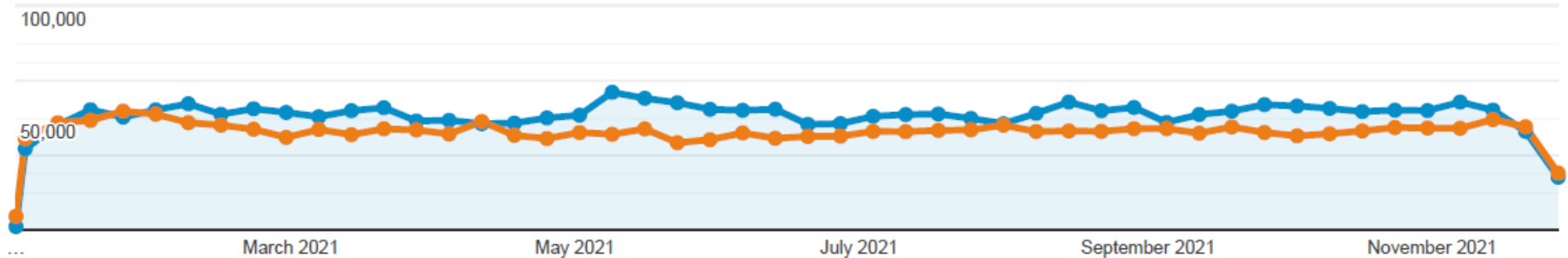
# Growing Customer Community and Usage



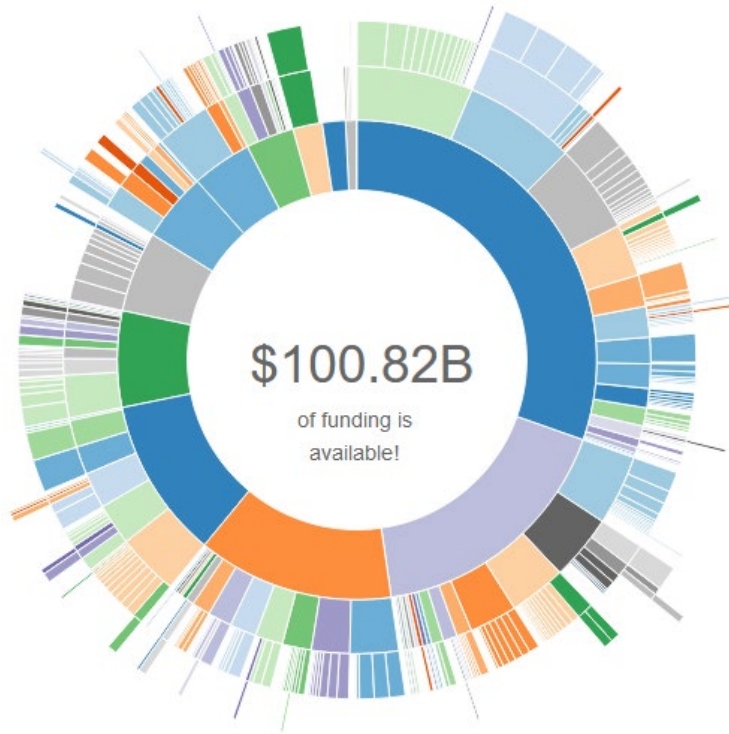
Welcomed dozens of new customers to our customer community & many New Admins


Year over year usage up 16%

Jan 1, 2021 - Nov 29, 2021: ● Sessions  
Jan 1, 2020 - Nov 29, 2020: ● Sessions 16.15% ▲



# Greatly Expanded Funding Opportunities Content



- 27,000+ Active opportunities (25% )
- More than 10,000+ New opportunities added
- 51,000 Opportunities Updated YTD
- ~1,100 Opportunities edited per week
- More than \$20B in additional funding added in the quarter
- Hundreds of New Funders
- Expanded International Coverage

# Growth in Profiles, Email Alerts and Awarded Grants YTD



+ 101,300 New Profiles added  
> 719,750 Profiles Updated



>7.1M Weekly Funding Alerts sent



>50,000 Awarded Grants added

# 2021 Roadmap Review

## Continuous Enhancements for Pivot-RP



# Key Objectives & Themes for 2021



- Enhance existing features
- Add new features based on customer input
- Ongoing commitment to accessibility



- Continued growth in funding opps, profiles, conferences and grant content
- Authoritative indexing, reliability & accuracy



- Data center upgrade
- Email platform upgrade
- Security enhancements

# Most enhancements driven by customer requests



How can we improve Pivot-RP?

Enter your idea

Hot

Top ideas

New

Category

Status

My feedback

Have an  
Idea for  
Ex Libris?



Share  
your ideas



Support your  
favorite ideas



Get feedback  
on popular ideas

Welcome to Ex Libris Idea Exchange! ***We'd love to hear your ideas for us.***

To suggest an idea, please select one of the following forums

<https://ideas.exlibrisgroup.com/forums/911902-pivot>

# More than a dozen customer-requested enhancements completed YTD!

Search by  
Recently Added Date

Add Sponsor/Funder  
Type to Export Reports

Add Custom Note that  
applies to all Limited  
Submission Opps

Allow Curated Searches  
to be refined and  
filtered like a Search  
Result

Make it easy to Delete  
Opportunities from  
Tracked Lists

Provide Country of  
Funder Filter and  
Search Capabilities

Make it possible to  
Exclude Multiple  
Search Fields

Clarify the times when  
newsletters are sent

Be able to get  
Deadline reminders up  
to 4 months out

Add Sponsor Name to  
Calendar View

Offer more capabilities  
for us to customize  
newsletter templates

Add more descriptive  
information to  
Email Alerts

Add sort by relevance  
to Newsletters and  
Embedded Searches

Provide a  
Microsoft Word and  
PDF Export option

December Release

# Recently Added Search & Results Filters

**Search Funding Results** Your Search: (cancer)  
Advanced Search Save Search Refine Search

<b>Recently added</b>		
Last 30 days	3	<input type="checkbox"/> <b>1,090 Results</b> Sort ▾
Last 14 days	2	<input type="checkbox"/> <b>Breast Cancer Research Init</b> Breast Cancer Coalition of Rochester
Last 7 days	1	<input type="checkbox"/> <b>Lorne Cancer Conference - I</b> Lorne Cancer
<b>Submission type</b>		<input type="checkbox"/> <b>Lung Cancer Discovery Awar</b> American Lung Association (ALA)
Limited Submission	44	<input type="checkbox"/> <b>Nina Donnelley and The Dick</b> Award in Honor of Laurel W.
Other internal coordination required	2	
<b>Deadline Certainty</b>		
Anticipated	660	
Confirmed	429	
<b>Funding types</b>		
Research: Project Grants & Innovation	800	
Fellowships or Post-doctoral Awards	151	

► Applicant Type

► Funder Type

▼ Recently Added

and Added within last:  7 days  14 days  30 days

# Curated Searches: View as a Search Result

The screenshot shows the ExLibris Pivot-RP interface. At the top, the user is logged in as Eddie Neuwirth. The navigation bar includes links for Funding, Profiles, Conferences, Awarded Grants, and News. A search bar and utility links for Support, Admin, and Announcements are also present. The main content area displays a list of curated searches. On the left, a sidebar shows various search categories: Tracked (148), Saved Searches (36), Shared (3), Received (4), Advisor, Curated (46), and My Curated Searches (259). The 'ANZ medicine search' is selected under My Curated Searches. The main list shows several search results, each with a checkbox, a title, a description, a deadline, and an amount. The 'View as a Search' button is highlighted with a red box.

Search Title	Created by	Display	Sort	Deadline	Amount
<input type="checkbox"/> <b>ANZ medicine search (259)</b>	Eddie Neuwirth	<input checked="" type="checkbox"/>			
<input type="checkbox"/> <b>Investigator Initiated Clinical Trials (IICT)</b>	Fonds National Suisse (FNS)			25 May 2021	see record
<input type="checkbox"/> <b>Industry PhD-grants</b>	Swedish Foundation for Strategic Research			25 May 2021	2,500,000 kr SEK
<input type="checkbox"/> <b>Research Grants</b>	Ophthalmic Research Institute of Australia (ORIA) Royal Australian and New Zealand College of Ophthalmologists (RANZCO)			25 May 2021	\$50,000 AUD
<input type="checkbox"/> <b>NHMRC Development Grants</b>	National Health and Medical Research Council (NHMRC) - Australia Department of Health - Australia			26 May 2021	see record

# Customizable Newsletters & Templates



Powered by Pivot and Research Professional

### Funding News for Eddie Neuwirth



### The latest Nursing Funding Opportunities

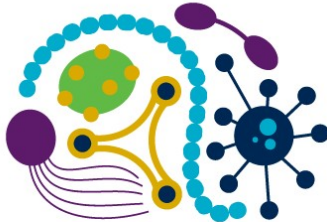
You can now include custom images, [link to other content and webpages](#), and/or highlight content by using **bold**, *italic* or underline text. You can also use different colors.

Nursing Funding Opps		
48 Opportunities	Deadline	Amount
<b>Accelerating Drug Discovery for FTD</b> Association for Frontotemporal Degeneration (AFTD)	28 May 2022 Letter of Intent Anticipated	\$150,000usd
<b>Beamtime Allocation</b> European Synchrotron Radiation Facility (ESRF)	10 Sep 2021 Proposals	<b>see record</b>



Powered by Pivot and Research Professional

### Funding News for Eddie Neuwirth



### Microbiome Funding Opportunities

This is a test newsletter to showcase the latest customization features of the new newsletter content editor. You can now include custom images, [link to other content and webpages](#), and/or highlight content by using **bold**, *italic* or underline text. You can also use different colors.

1. Newsletters can include numbered lists
2. item
3. item

You can also change the size of text. (image above used courtesy of UC Davis Microbiome Special Research Program <https://microbiome.ucdavis.edu/>)

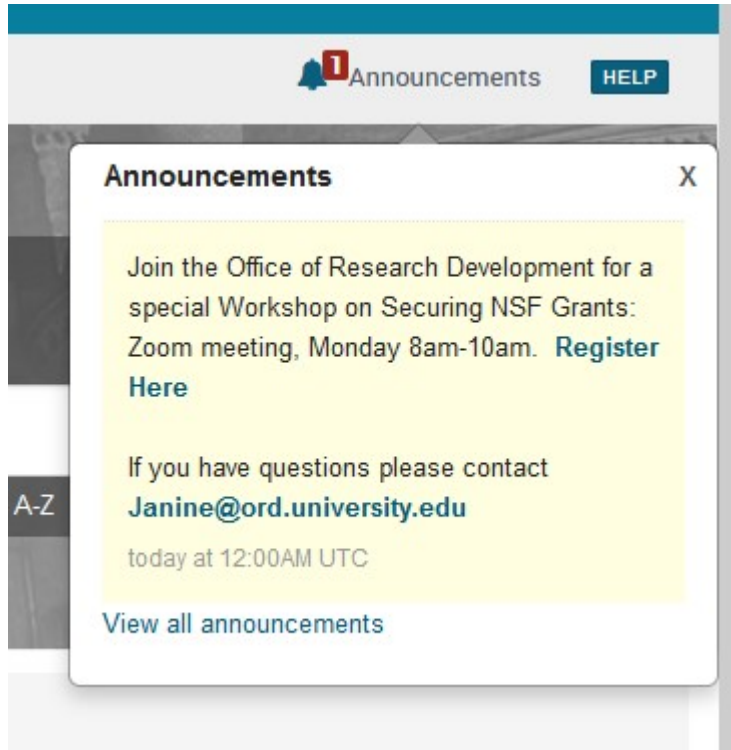
### Funding Opportunities you may be interested in:

Microbiome Funding Opps
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# December Enhancements

**What's New?**  
**Release: December 14, 2021**

# Enhanced Announcements



- Newly-added announcements will automatically display for users when they first log in for increased visibility
- Announcements remain “sticky” – always visible – until the user closes the pop-up to ensure important information is not missed








# Setting and Scheduling Announcements

 Admin Dashboard

## Institutional Settings


- Search Settings
- Global Messages
- Announcements**
- Admin Accounts
- Custom Branding
- Full Text Linking
- RP News Integration


 **Current Announcements (1)** [Add Announcement](#)

**Announcement**    

This is an active test announcement.

36 of 400 characters

**Start Date**  


**Expiration Date**  

[Delete Announcement](#) [Cancel](#) [Save](#)

- Add unlimited announcements
- Choose the dates when announcements appear and disappear for your users



Funding Alert from Pivot-RP <pivot-no-reply@proquest.com>



## Research University

Powered by Pivot and Research Professional

### Funding Alerts for December 07, 2021

Advisor	Deadline	Amount
<p style="font-size: small; margin: 0;"><b>Advisor</b> Personal funding matches (124)</p> <p style="margin: 5px 0;"><b>Arts and Culture Grants</b> Cleveland Foundation</p> <p style="font-size: x-small; margin: 5px 0;">The foundation is committed to sustaining a vibrant and healthy cultural community. Its proactive grantmaking focuses on two important initiatives: 1. Creative Fusion supports long-term residencies for international artists within Cleveland's cultural institutions. 2. Sustaining Excellence is a program...</p>	<p style="font-size: small; margin: 0;">unspecified</p> <p style="font-size: small; margin: 0;">Postponed</p>	<p style="font-size: small; margin: 0;"><b>\$60,000</b></p>
<p style="margin: 5px 0;"><b>Human Rights and Economic Justice</b> General Service Foundation</p> <p style="font-size: x-small; margin: 5px 0;">The overarching goal of the program is to support efforts that protect, promote and create good jobs with living wages for workers, including low-wage workers, in the United States and Mexico, so that workers on both sides of the border can live and work in dignity. Program strategies include the following...</p>	<p style="font-size: small; margin: 0;">September 1, 2022</p>	<p style="font-size: small; margin: 0;"><b>\$60,000</b></p>
<p style="margin: 5px 0;"><b>Research Supplements to Promote Re-Entry Into Biomedical and Behavioral Research Careers - NEI</b> United States Department of Health and Human Services (HHS) National Institutes of Health (NIH) National Eye Institute (NEI)</p>	<p style="font-size: small; margin: 0;">unspecified</p> <p style="font-size: small; margin: 0;">Postponed</p>	<p style="font-size: small; margin: 0;"><b>€360,000</b></p>

## Brief Descriptions added to Weekly Email Alerts

- Users get a brief snippet of information about each opportunity
- Makes it easier to determine if opportunities are relevant before logging in



Beginning with December 19<sup>th</sup> alerts



Daniela <pivot.support@proquest.com>

Test Email

Reply

Reply All

Forward



Sun 11/28/2021 7:00 AM

If there are problems with how this message is displayed, click here to view it in a web browser.

## ExLibris | Pivot-RP

Powered by Pivot and Research Professional

### Funding News for Test Account

#### Coronavirus - COVID-19

5 Opportunities

Deadline

Amount

##### Artists in Communities and Schools Projects

26 Oct 2021

\$20,000CAD

Ontario Arts Council (OAC)

The program supports the research, development and realization of community-engaged arts projects in Ontario. Activities involve professional Ontario artists and community members working together to design, develop and realize collective creative experiences.

Community-engaged art practices are...

##### BIAA Study Grants

28 Apr 2022

£2,000GBP

British Institute at Ankara (BIAA)

The Institute welcomes applications for research that fits within the Strategic Research Initiatives currently sponsored by the Institute.

The current SRI's of the British institute at Ankara are:

##### Mobilize Power Fund

Continuous

\$20,000USD

Third Wave Fund

Third Wave Fund's Mobilize Power Fund is a rapid response fund that supports the leadership of young women of color, trans, gender non-conforming, queer, and intersex youth under 35 in social movements.


The sponsor launched this fund because powerful movements need the ability to respond to and heal...

# Brief Descriptions added to Newsletters Emails

- Users get a brief snippet of information about each opportunity within the newsletter email body

# Training Resources

## 2021 Updates

Search under current path 

Pivot-RP

Home » Pivot » Training

## Training

### Getting Started with Pivot-RP

Basic information that researchers and staff need to start using Pivot-RP, including setting up your account, claiming and updating your profile, and searching for funding opportunities (Spanish captioning available on YouTube)

### Working with Pivot-RP Funding Opportunities

These training sessions will show the primary Pivot-RP workflows, including using basic and advanced search; navigating funding results; and tracking, saving, sharing, and managing funding opportunities (Spanish captioning available on YouTube)

### Working with Pivot-RP Profiles

Use Pivot-RP to find researchers with whom you can collaborate; and update your own Pivot-RP Profile so you can get relevant funding matches targeted to you.

### Sharing Content with Pivot-RP Groups

Create and manage user groups in Pivot-RP, which can be used to share funding opportunities and more with users with similar interests (Spanish captioning available on YouTube)

### Features for Pivot-RP Administrators

Pivot-RP administrators will learn how to customize, configure, and manage Pivot-RP for their institution.

### Extended Training on Pivot-RP

These training sessions go beyond the basic training concepts in Pivot-RP and present other tools and workflows available to researchers and to staff at your institution who administer Pivot-RP.

# YouTube & Training Modules

2-5 minutes videos with links to corresponding documentation

“Pivot Essentials” Videos being refreshed over next few months

# Customer Success Webinars – Launched in 2021

A short series focused on tips for using Pivot-RP tools to engage your research community.

Showcasing your Curated Lists and Searches by getting them in front of your researchers with:

- Newsletters
- Linking to Lists
- Embedded Searches

Links to recordings will be posted soon  
Institution-specific sessions can be arranged  
[We'd like your feedback on what to cover in 2022.](#)

Best practices and tips  
with Customer Success  
(25-30 minutes)

<https://bit.ly/3In2UsS>

<https://proquest.libguides.com/pivot#s-lg-box-25908043>

 **Getting Started with Pivot-RP - Accessing, Creating, Claiming, and Searching Profiles**


The objectives of this session are to describe Pivot-RP and its benefits for research funding and collaboration; create, claim, or revise a professional profile; and discover research collaborators through Pivot-RP profiles.

This is end user session 1 of 3. Duration: 34 minutes.

 **Funding Opportunities for Pivot-RP End Users**

The objectives of this session are to discover funding opportunities using Pivot-RP, navigate and refine results, and manage your funding opportunities.

This is end user session 2 of 3. Duration: 32 minutes.

 **Conferences, Papers Invited, and Awarded Grants in Pivot-RP**

The objectives of this session are to identify and define Conferences, Papers Invited, and Awarded Grants, and to illustrate content in this section of Pivot-RP.

This is end user session 3 of 3. Duration: 29 minutes.

 **Getting Started with Admin Tools Pivot-RP**

The objectives of this session are to identify Pivot-RP administrator accounts and assign permissions, and to recognize and interpret the reports available in the Pivot administrator.

This is administrator session 1 of 2. Duration: 36 minutes.

 **Managing Your Research Workflows with Pivot-RP**

This objectives of this session are to find what modules are available in the Pivot manager and to identify available tools and recognize the scope of the administrator.

This is administrator session 2 of 2. Duration: 33 minutes.

# Training Team Webinars

30-minute recorded  
sessions with our  
training team

Including  
downloadable PPTs

A computer monitor with a black bezel and a silver stand is centered in the upper half of the slide. The screen is white and displays the text 'Thanks for Joining Us' in a large, bold, blue font. Below this, in a smaller black font, is the text 'Contact: Eddie.Neuwirth@exlibrisgroup.com'. The background of the slide is light teal with a large, stylized blue and white globe in the top right corner and a light teal circular shape in the top left corner.

# Thanks for Joining Us

Contact:  
Eddie.Neuwirth@exlibrisgroup.com

## Questions?