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KEA 4th Semester, Business and IT

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Resume

This report presents a digital transformation plan for Acta Venture Partners, focusing on the development and implementation of a proprietary CRM system. Acta is in the midst of a transition from using IT as a supportive function to becoming a strategic driver for the company's growth. To support this transformation, Acta must streamline its business processes, including capital raising, deal sourcing, due diligence, and portfolio management.

The company is facing challenges due to fragmented systems that create data silos and prevent real-time decision-making. Therefore, Acta has recognized the need for an integrated digital infrastructure that can ensure real-time insights, scalability, and better decision-making. The CRM system, central to this transformation, will digitize and automate core processes and ensure more efficient data management and compliance with GDPR.

The report outlines a step-by-step plan for the development of Nexus CRM, including an analysis of Acta's current technological landscape, the creation of prototypes and data flow models, and the development of a scalable client-server architecture. The implementation of the system will lead to improved investor reporting, automation of investment processes, and optimization of portfolio management.

Finally, the report recommends a structured implementation strategy that ensures quick wins in terms of task management and user-friendliness, followed by long-term benefits such as scalability, real-time data, and automated business processes.

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1. Introduction

Acta Venture Partners is undergoing a significant digital transformation, moving from Generation 2 to Generation 3 on the digital maturity scale. Until now, Acta's IT infrastructure has primarily supported existing processes, but the new goal is to create innovative services and products through digitization. The company strives to change IT's role from being a supportive technological function to a strategic partner that drives growth and business development (CEO, personal communication, August 29, 2024).

Currently, Acta uses multiple front- and back-end systems, including an ERP system for accounting and time tracking, Notify and Google Sheets for customer acquisition, and Google Workspace for internal communication. The company is also developing a proprietary IT system, which will form the foundation of their future digital infrastructure and support key processes such as reporting, process management, and pipeline overview (Investment Manager, personal communication, September 18, 2024).

The current IT structure supports all central processes, with the proprietary system serving as a solution for tasks that are not automated. With cloud technology as a foundation, the systems are scalable, flexible, and adaptable to future needs (CEO, personal communication, September 29, 2024).

This transformation represents an important cultural and technological shift, where IT moves from being an infrastructural tool to becoming an integrated part of the business strategy. By reaching Generation 3, Acta will be able to develop new digital products and services that support the company's strategic goals and growth.

To support this transformation, there is a need for an integrated CRM system as part of Acta's proprietary software. This system will streamline customer acquisition, improve investor reporting, and optimize data utilization. Additionally, the CRM system will enhance customer experiences, strengthen investment processes, and ensure better data management, including compliance with

KYC requirements, tracking investment performance, and pipeline management. These improvements will be crucial for future decisions and operational efficiency.

This report outlines a digital transformation plan for the development of the CRM system. It presents concrete steps for implementation as a central part of Acta's software, which will support the company's future growth and success in a digital world.

2. Background and Method

Acta Venture Partners is a venture capital firm specializing in providing high-growth companies with access to venture markets, expertise, and capital. The company's core activities include capital raising, deal sourcing, due diligence, and portfolio management. Acta aims to become the leading venture capital provider in Europe by leveraging strategic partnerships and an experienced team (CEO, personal communication, August 29, 2024). To achieve this, it is crucial to streamline investment processes and strengthen relationships with both investors and high-growth companies using digital tools.

Technological Challenge

Currently, Acta relies on multiple non-integrated systems, including ERP systems, Google Sheets, and Notify. These systems operate individually but create data silos, resulting in fragmented processes and limiting the company's ability to scale and make data-driven decisions in real time (Investment Manager, personal communication, September 18, 2024). Without a fully integrated digital infrastructure, employees spend time on manual tasks that could be automated, hindering operational efficiency.

In a market where competition among venture capital firms is intensifying, many companies are implementing advanced digital tools to enhance their deal sourcing, investor relations, and portfolio management. To remain competitive, Acta has recognized the need to integrate a more automated and data-driven CRM system that can support real-time insights, increased scalability, and improved decision-making.

Methodological Approach

To analyze and develop a digital transformation strategy focused on implementing a CRM system for Acta, the following methodological approaches were employed:

Primary Data Collection: Interviews with key personnel at Acta, including the company's CEO and Investment Manager, were conducted (personal communication, August and September 2024). These interviews provided insights into the company's current technological landscape, challenges with fragmented systems, and the need for a more integrated solution.

Secondary Data: Comprehensive desk research was performed to examine internal documents from Acta, such as Acta Nexus Process Descriptions and Acta Short Deck. These documents provided an understanding of Acta's investment processes, strategic goals, and the need for digital transformation. Additionally, relevant sources on CRM systems, cloud-based solutions, and technologies like AI and machine learning were analyzed. This helped identify best practices within the venture capital industry and provided a deeper understanding of how Acta can benefit from a more integrated digital infrastructure.

Analysis Model: To assess how a CRM system could be integrated into Acta's existing business processes, a CRM transformation model was developed based on theories from Management Information Systems (2020). The model addresses Acta's technological challenges by implementing cloud technology, automation, and real-time data analysis to enhance scalability and improve operational efficiency. To illustrate how a CRM system can strengthen Acta Venture Partners' value proposition and optimize their business processes, a Business Model was first developed using the Value Proposition Canvas (Strategyzer, 2024). This provided a structured approach to identify the specific areas where the CRM system could create value for both Acta and their stakeholders.

Iterative Development and Prototyping: A step-by-step development/transformation plan (Google, Business Transformation with Google Cloud, Coursera: Coursera, 2021) for Acta's CRM system was formulated, focusing on user-friendliness, functionality, and technological integration. Prototypes of the CRM system will be continuously tested and adjusted in close

collaboration with the company's stakeholders to ensure that the system meets both current and future needs.

This combined method ensures a holistic approach to Acta's digital transformation, where technological solutions not only support the company's current operations but also promote future growth and competitiveness in the venture capital market.

3. Results/Findings

3.1 How Can a CRM System Promote Acta Venture Partners' Digital Transformation?

Acta Venture Partners' Digitale CRM Transformationsmodel.

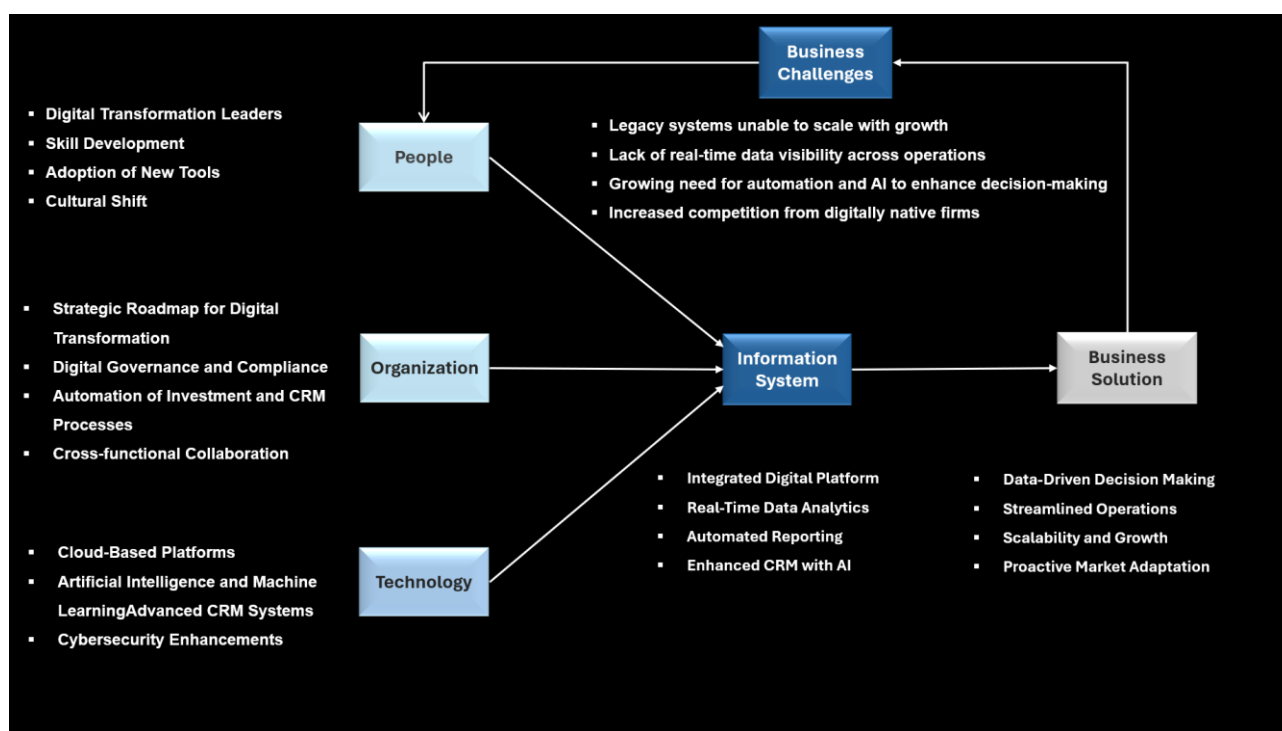


Fig. 3.1 Acta Venture Partners' Digital CRM Transformation model (Management Information System, Kenneth C. Laudon & Jane P. Laudon, 2020)

This business model describes the development of a CRM system for Acta Venture Partners, designed to address key business challenges such as scalability, security, and real-time performance. The model integrates cloud-based technologies, AI, and machine learning to automate core processes like deal flow, portfolio management, and investor reporting. The solution focuses on

improving operations, strengthening investor relations, and ensuring GDPR compliance, while also supporting future growth and data-driven decision-making.

1. Business Challenges

Acta Venture Partners faces key challenges related to scalability, security, and performance. The company must handle thousands of investment opportunities annually while ensuring GDPR compliance and protecting sensitive data (Legal Desk, 2022). Additionally, Acta needs quick access to real-time data to make informed decisions and optimize their investment processes. Without the integration of AI and real-time data analytics, they risk falling behind in data-driven decision-making.

2. People and Organization

To promote digital transformation at Acta, strong leadership from digital transformation leaders is needed to ensure that the CRM system is effectively implemented and integrated with the company's strategic goals. Furthermore, it is important to invest in employees' skill development so they can leverage the new digital tools. A cultural shift towards a digital-first mindset is also necessary to ensure that Acta can compete in a more digitized world (McKinsey, 2024).

3. Organizational Efficiency

Acta needs a clear digital transformation strategy that focuses on automating key processes such as contact management, deal flow, and portfolio management. The CRM system will enable the streamlining of these processes, leading to better cross-functional collaboration and improved access to data across the organization. Automated reports and real-time updates will enhance transparency for investors and other stakeholders (CEO, personal communication, August 29, 2024).

4. Technology and Information Systems

Acta's CRM system will be built on a cloud-based infrastructure, enabling scalability and flexibility. By implementing artificial intelligence and machine learning, the system will support automated deal sourcing, portfolio management, and predictive analytics. Additionally, strong cybersecurity measures will ensure robust data protection and GDPR compliance, giving investors confidence in the system (CEO, personal communication, August 29, 2024).

5. Business Solution and Growth

By adopting a data-driven approach, the CRM system will help Acta make fast, accurate decisions while reducing the time spent on manual processes. The cloud-based platform, combined with AI technologies, allows Acta to scale their operations and handle an increasing number of deals. At the same time, the system will help the company adapt to changing market conditions and identify future investment opportunities, enhancing Acta's competitiveness and ensuring future growth (Investment Manager, personal communication, September 18, 2024).

3.2 How can a CRM-system improve Acta Venture Partners' value proposition and business processes?

To create an overview of how a CRM system can impact Acta Venture Partners' Value Proposition, we can structure tables that divide the key areas into "Products," "Services," "Pain Relievers," "Gain Creators," and "Job-to-Be-Done." The table will highlight how the CRM system can optimize these aspects of Acta's value proposition.

Impact of CRM System on Acta's Value Proposition

1. Products

Product	Impact of CRM System
Investment Opportunities	The CRM enables better deal flow management, making investment opportunities easier to monitor and analyze.
Venture Capital Funds	The system provides real-time insights into the funds' performance, ensuring transparency and quick updates to investors.
Equity Stakes in Startups	The CRM can track the value of equity stakes in startups and provide accurate information on exit strategies.

Tab.3.2.1 Impact of CRM System on Acta's Value Proposition (Product) (CEO, personlig kommunikation, 29. august 2024).

2. Services

Service	Impact of CRM System
Capital Raising	The CRM automates deal sourcing and screening, ensuring more targeted investments and faster capital raising.
Deal Sourcing and Screening	AI-driven CRM helps identify the best investments based on data, increasing the accuracy of due diligence.
Portfolio Management	The CRM enables real-time updates of financial key figures, making portfolio management more efficient and reactive.
Investor Relations and Reporting	Automated reports ensure ongoing updates to investors, improving transparency and satisfaction.
Exit Planning and Management	The CRM can create simulations for exit strategies and plan the best timing for exits based on data.
Strategic Guidance and Mentorship	The platform can collect data on startup performance, which can be used for advisory and mentorship purposes.

Tab.3.2.1 Impact of CRM System on Acta's Value Proposition (Services) (Investment Management, personlig kommunikation, 18. september 2024).

3. Pain Relievers

Pain Reliever	Impact of CRM System
Deal Sourcing	Automated processes for deal sourcing reduce the risk of missing out on good investment opportunities.
Due Diligence	The CRM ensures faster and more accurate due diligence through data analysis and automation of screening processes.
Capital Raising	The system can forecast financing needs and match startups with investors more effectively.
Valuation	Automated portfolio management provides continuous updates on the company's value, minimizing errors.
Advisory and Support	AI-driven recommendations and analyses ensure that investors and startups receive ongoing support throughout the process.

Tab.3.2.2 Impact of CRM System on Acta's Value Proposition (Pain Relievers) (CEO, personlig kommunikation, 29. august 2024).

4. Gain Creators

Gain Creator	Impact of CRM System
Exclusive Investment Opportunities	The CRM enables better screening of exclusive investment opportunities through data analysis.
Advisory and Guidance	The CRM can automate investor updates and provide tailored advice to startups.
Ongoing Support	The CRM provides continuous updates and real-time data, helping to improve the relationship between investors and startups.
Valuation	Automated portfolio management provides continuous updates on the company's value, minimizing errors.
Advisory and Support	AI-driven recommendations and analyses ensure that investors and startups receive ongoing support throughout the entire process

Tab.3.2.3 Impact of CRM System on Acta's Value Proposition (Gain Creators) CEO, personlig kommunikation, 29. august 2024).

5. Job-to-Be-Done

Job-to-Be-Done	Impact of CRM System
Maximize Returns	The CRM enables better investment monitoring and ensures timely decision-making to maximize returns.
Long-term Investment	Real-time data and automated reports help Family Offices make more informed decisions
High Net Worth Individuals	The CRM personalizes communication with HNWI's and delivers tailored investment opportunities.
Capital for Growth	The system matches startups with investors and helps overcome financing barriers quickly and efficiently.

Tab.3.2.4 Impact of CRM System on Acta's Value Proposition (Job-to-Be-Done) (CEO, personlig kommunikation, 29. august 2024).

These tables titled "Impact of CRM System on Acta's Value Proposition: [1–5]" demonstrate how the implementation of a CRM system can strengthen Acta Venture Partners' value proposition by increasing efficiency, improving data-driven decision-making, and optimizing the relationship between investors and startups.

4. Recommendation

4.1 Phased Development of Acta's Nexus CRM: From Quick Gains to Long-term Transformation

The recommendation plan describing the phased development of Acta Venture Partners’ Nexus CRM system focuses on achieving both short-term gains and long-term strategic goals through a structured implementation. From quick improvements such as task management and user-friendliness to long-term transformation with contact management and portfolio management, this plan will ensure a scalable and effective digital solution for Acta.

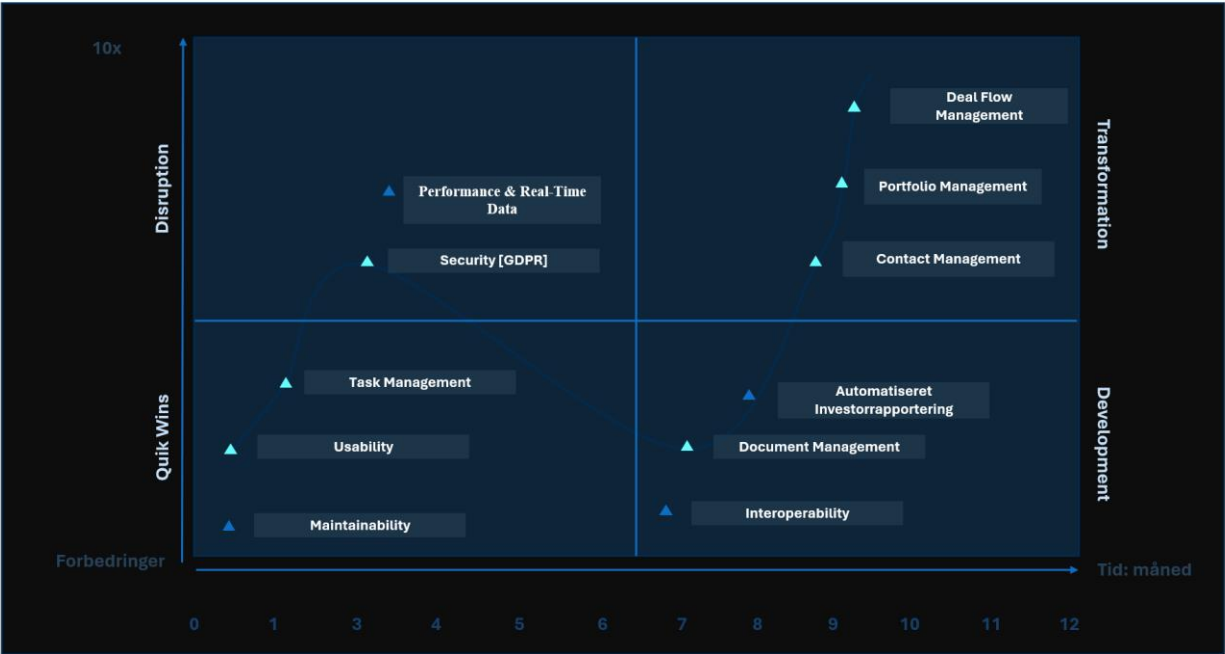


Fig. 4.1 Acta Digital Transformation Roadmap (Google, Business Transformation with Google Cloud, Coursera: Coursera, 2021)

The curve illustrates how the impact of the implemented features gradually increases. Early gains come from simple improvements (Quick Wins), followed by a period of disruption where the system achieves greater effectiveness. Subsequently, the focus shifts to more complex and integrated features, leading to significant long-term transformation with the most value-creating functions such as portfolio management and deal flow management, which have the greatest impact on the company.

Quick Wins (Kort sigt, hurtige gevinster)

Fase	Tidshorisont	Funktion/Krav	Handling	Effekt
1. Quick Wins	0-3 måneder	Task Management	Implement a system to assign tasks and send automated reminders for critical follow-ups.	Fast gains in the form of better task management and improved communication.
		Usability	Develop an intuitive interface that makes it easy for both technical and non-technical users to navigate the system and generate reports.	Improved user experience and increased productivity among internal and external users.
		Maintainability	Make the system easy to update and customize to meet future business needs.	Fast adaptation to changes in business requirements and market conditions.

Tab. 4.1.1Acta Digital Transformation Roadmap (Quik Wins) (Acta Short Deck, 2023)

For quick improvements in efficiency, it is recommended to start with features such as task management, usability, and maintenance. Task management will improve workflows by ensuring automated follow-ups on important tasks, while an intuitive interface will make it easy for both technical and non-technical users to navigate and generate reports, thereby increasing satisfaction and efficiency. Maintenance should be prioritized to ensure that the system can be easily updated and adapted to changing business needs.

Disruption (Short-term, High Impact)

Phase	Time horizon	Funktion/Requirement	Action	Effect
2. Disruption	3-6 måneder	Performance & Real-Time Data	Implement real-time updates and quick access to portfolio and investment data for faster and more accurate decision-making processes.	Immediate improvement in decision-making and portfolio management.
		Sikkerhed (GDPR) (Security)	Implement data encryption, role-based access, and features for data deletion and anonymization to ensure GDPR compliance.	Rapid enhancement of data security and compliance, protecting sensitive information.

Tab. 4.1.2 Acta Digital Transformation Roadmap (Disruption) (Acta Short Deck, 2023)

In the short term, it is recommended to focus on performance and real-time data as well as security to achieve a disruptive effect. Real-time updates will enable Acta to make informed decisions during critical phases such as term sheet negotiations, while implementing strict security measures like data encryption and role-based access will ensure GDPR compliance and protect sensitive data.

Development (Long-term)

Phase	Time-horizon	Funktion/Requirement	Action	Effect
3. Development	6-8 måneder	Automated Investor Reporting	Develop and implement automated reporting tools that provide real-time updates to investors and deliver customized performance reviews.	Improved transparency and investor relations through faster and more detailed updates.
		Interoperability	Integrate the CRM system with Acta's other systems, such as financial modeling tools, email systems, and legal management systems.	Streamlining work processes through seamless integration across platforms.
		Document Management	Implement centralized document storage for easy access and secure sharing of investment agreements and legal documents during due diligence.	Better document management and easier compliance with legal requirements.

Tab. 4.1.3 Acta Digital Transformation Roadmap (Development) (Acta Short Deck, 2023)

A gradual development of the system is recommended for functions such as automated investor reporting, interoperability, and document management. Automated reporting will improve transparency and strengthen investor relations by providing real-time updates. Integration with other systems, such as financial modeling tools and communication platforms, is essential to ensure that Nexus operates seamlessly across platforms. Centralized document management will ensure the secure storage and sharing of legal and financial documents, which is crucial for due diligence and contract management.

Transformation (Long-term, High Impact)

Phase	Time-horizon	Funktion/Requirement	Action	Effect
4. Transformation	8-12 måneder	Contact Management	Develop a contact management function that effectively handles information about investors, portfolio companies, and other stakeholders, as well as tracking interactions.	Long-term improvement of communication and relationships with customers and partners.
		Deal Flow Management	Implement a system to track deal flow from sourcing to exit, enabling filtering and tracking of investment opportunities through data-driven tools.	Improved decision-making and efficiency in handling thousands of investment opportunities.
		Porteføljestyling (Portfolio Management)	Implement tools to track and manage the performance of portfolio companies, including financial metrics and strategic milestones.	Enhanced strategic insight and control over portfolio companies.

Tab. 4.1.4 Acta Digital Transformation Roadmap (Transformation) (Acta Short Deck, 2023)

In the long-term perspective, the focus should be on key functions such as contact management, deal flow management, and portfolio management. Implementing contact management will improve follow-up and communication with investors and partners, while deal flow management will streamline the entire investment process and enhance data-driven decision-making. Portfolio

management will provide Acta with better control and insight into their investments, enabling them to adapt to future growth opportunities.

4.2 Nexus CRM-system User Interface (UI) Development plan

The transition from "Phased Development of Acta's Nexus CRM: From Quick Gains to Long-term Transformation" to "Phased Development Plan for a User-Friendly CRM Interface" shifts the focus from Acta's overall CRM implementation strategy to the specific steps necessary to design an intuitive and user-friendly interface. This approach ensures that both technical and non-technical users can interact effectively with the CRM system, enhancing the user experience and operational efficiency.

Phase	Time Horizon	Objective	Actions
1: Analysis and Research	1-2 weeks	Understand user needs and define intuitive UI	- Conduct stakeholder interviews - Requirements gathering - Create user scenarios
2: Concept Development and Prototyping	2-4 weeks	Develop the concept and early prototypes	- Design BPMN Model - Create Data Flow Diagram - Create Data Entity Relationship Model - Design High Fidelity Prototypes - Design Client-server architecture - Usability testing - Collect feedback and adjustments
3: UI Development	4-6 weeks	Build the actual user interface	- Frontend development - Responsive design - Backend integration
4: Testing and Improvements	2-3 weeks	Test the developed interface, improve based on feedback	- Usability testing - Performance testing - Ongoing improvements based on feedback
5: Implementation and Training	2 weeks	Rollout and ensure users are comfortable with the system	- Rollout of the new interface - User training - Setup of support structures
6: Ongoing Maintenance and Optimization	Ongoing	Ensure interface remains relevant and updated	- Continuous user feedback - Regular updates and maintenance

Tab. 4.2.1 Stepwise Development Plan for User-Friendly CRM Interface (Tab. 4.1.4 Acta Digital Transformation Roadmap (Quik Wins))

To ensure the successful development and implementation of Acta's Nexus CRM system, I propose that we follow a structured, phased approach as outlined in the attached roadmap. The development

process begins with an Analysis and Research phase lasting 1-2 weeks. In this phase, we will engage all relevant stakeholders to understand their specific needs and requirements. The goal is to define an intuitive user interface (UI) that is easy to use for both technical and non-technical users.

Next is the Concept Development and Prototyping phase, which spans 2-4 weeks. During this period, we will develop the initial prototypes of the system, including the design of data flow diagrams and the creation of a user journey that ensures effective interaction with the system. The prototypes will also be tested early to ensure usability, and necessary adjustments will be made based on user feedback.

The actual UI Development phase will take 4-6 weeks, during which we will build the final user interface. This phase will focus on both frontend and backend development as well as integration with existing systems. Our goal is to create a robust and responsive platform that meets Acta's technical and business requirements.

Once the system is developed, we move into the Testing and Improvement phase, which lasts 2-3 weeks. In this phase, we will conduct comprehensive testing of the system to ensure optimal performance and usability. Feedback from the testing phase will be used to make necessary improvements, ensuring the system functions flawlessly upon implementation.

The final steps in the development process include Implementation and Training, which will take 2 weeks. Here, we will roll out the system to users and ensure they receive adequate training in using the system. This will ensure that users are comfortable with the system from day one. Finally, Continuous Maintenance and Optimization will follow, where we will regularly update the system and adapt it to Acta's changing needs based on feedback and future business requirements.

By following this structured approach, we can ensure that the Nexus CRM system is developed and implemented effectively while supporting Acta's long-term strategic goals.

4.2.1 Proposal for the Development of Acta Venture Partners' Nexus CRM System

The proposal for the development of Acta Venture Partners' Nexus CRM system includes the designed prototypes, data flow model, and client-server architecture. To ensure that the system meets Acta's long-term goals and effectively supports operations, a structured development process is outlined.

4.2.1.1 Prototypes of Nexus CRM

The developed prototype of the Nexus CRM interface is designed with user-friendliness and scalability in mind (CEO, personal communication, August 29, 2024). The prototype is crafted with the following key features:

- **Intuitive User Interface:** The design ensures that both technical and non-technical users can easily navigate the system.
- **Scalability:** The interface is designed to handle future growth without compromising performance.
- **Data-Driven Decision Making:** The system provides access to real-time data through dashboards, enabling informed and swift decision-making.

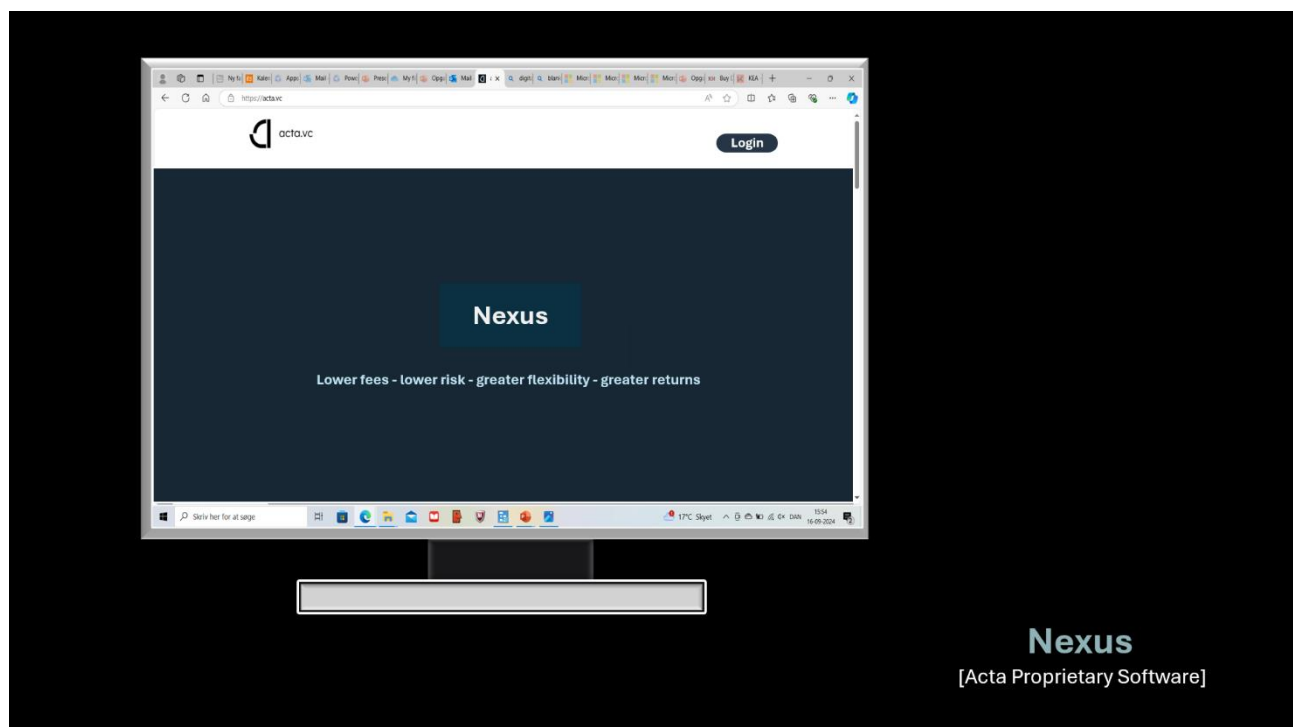


Fig.4.2.1.1a Nexus Login System

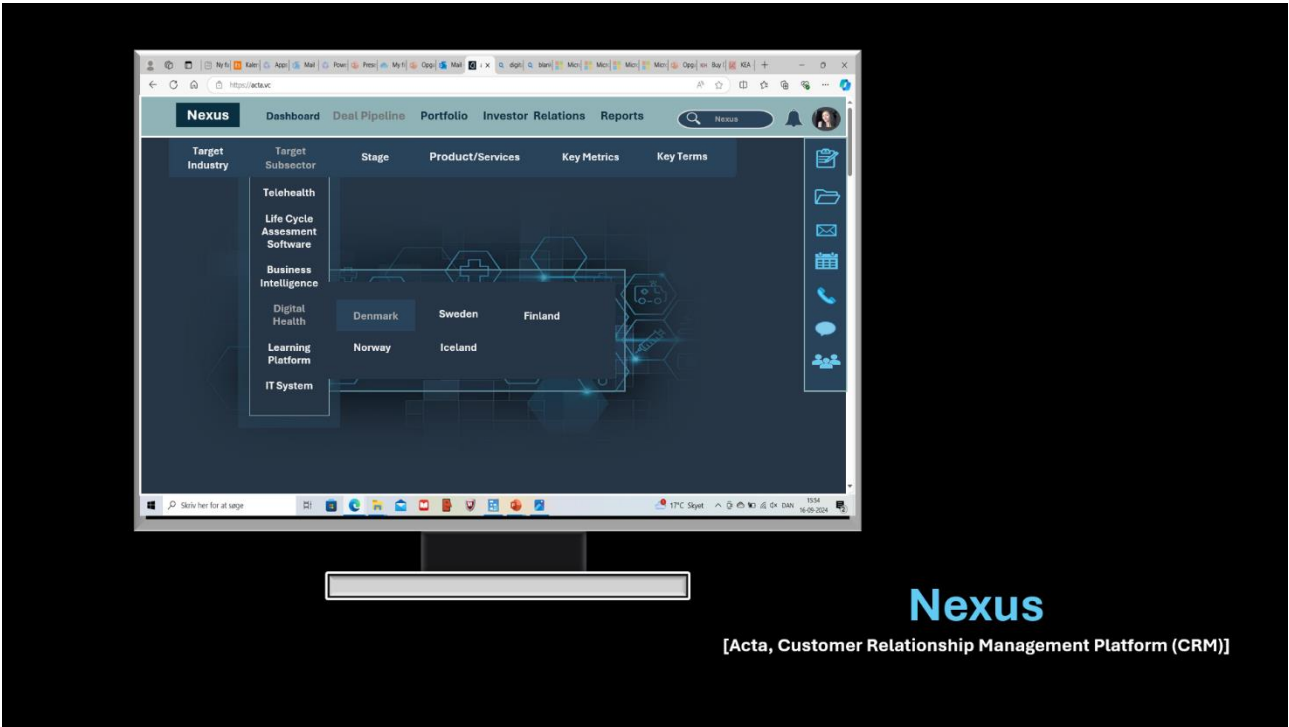


Fig.4.2.1.1b Nexus Deal Pipeline System

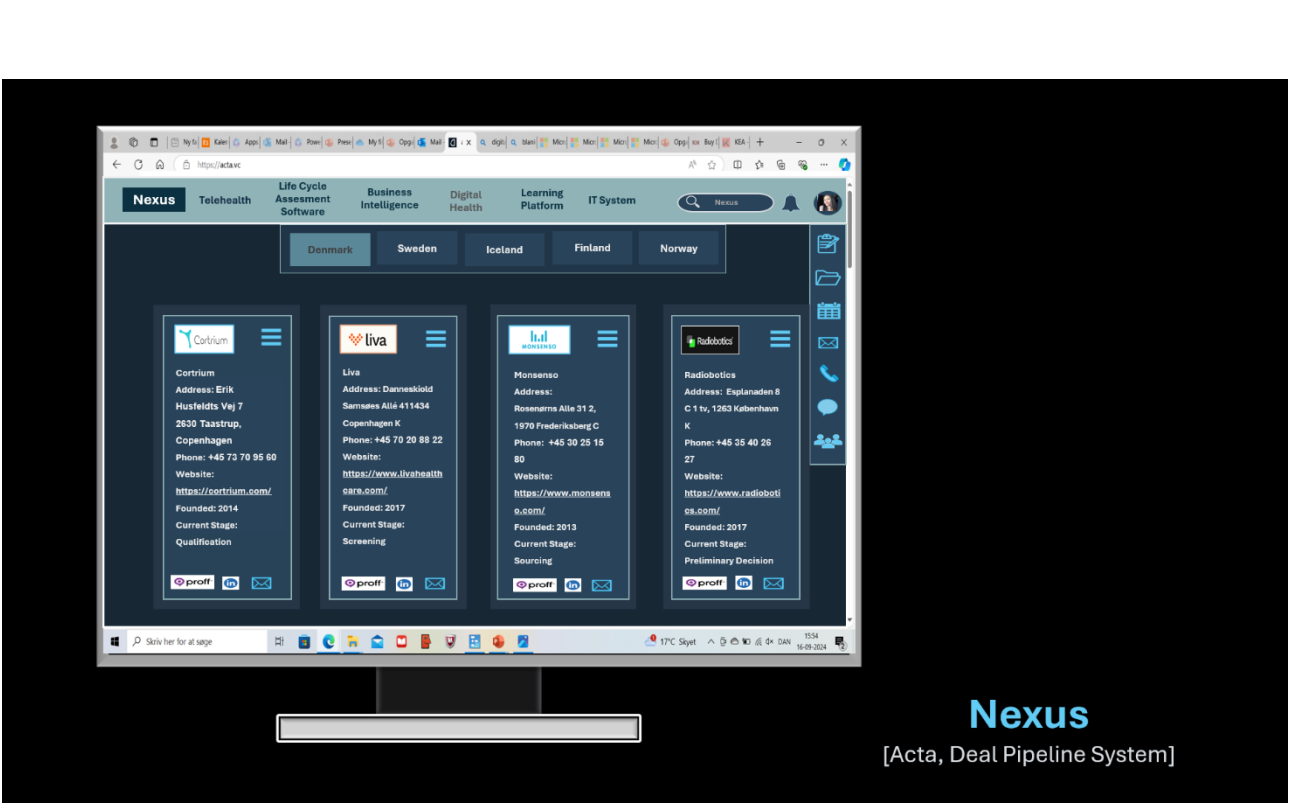


Fig.4.2.1.1c Nexus Deal Pipeline System: Digital Health

Prototypes have already been tested for usability, and further testing with key stakeholders will be conducted in the upcoming phases.

4.2.1.2 Nexus Deal Pipeline Data Flow

The data flow model illustrates how data moves through the Nexus CRM system from input to analysis and reporting. The model is designed to eliminate data silos and create a more streamlined real-time data management process.

- **Seamless Integration:** The model ensures that data can be easily integrated between Acta's existing systems, such as ERP and accounting systems.
- **Real-time Updates:** Data is continuously synchronized, ensuring that investors and employees have access to the latest data in real time.
- **GDPR Compliance:** All personal data is handled securely, with data encryption and access rights in accordance with GDPR regulations.

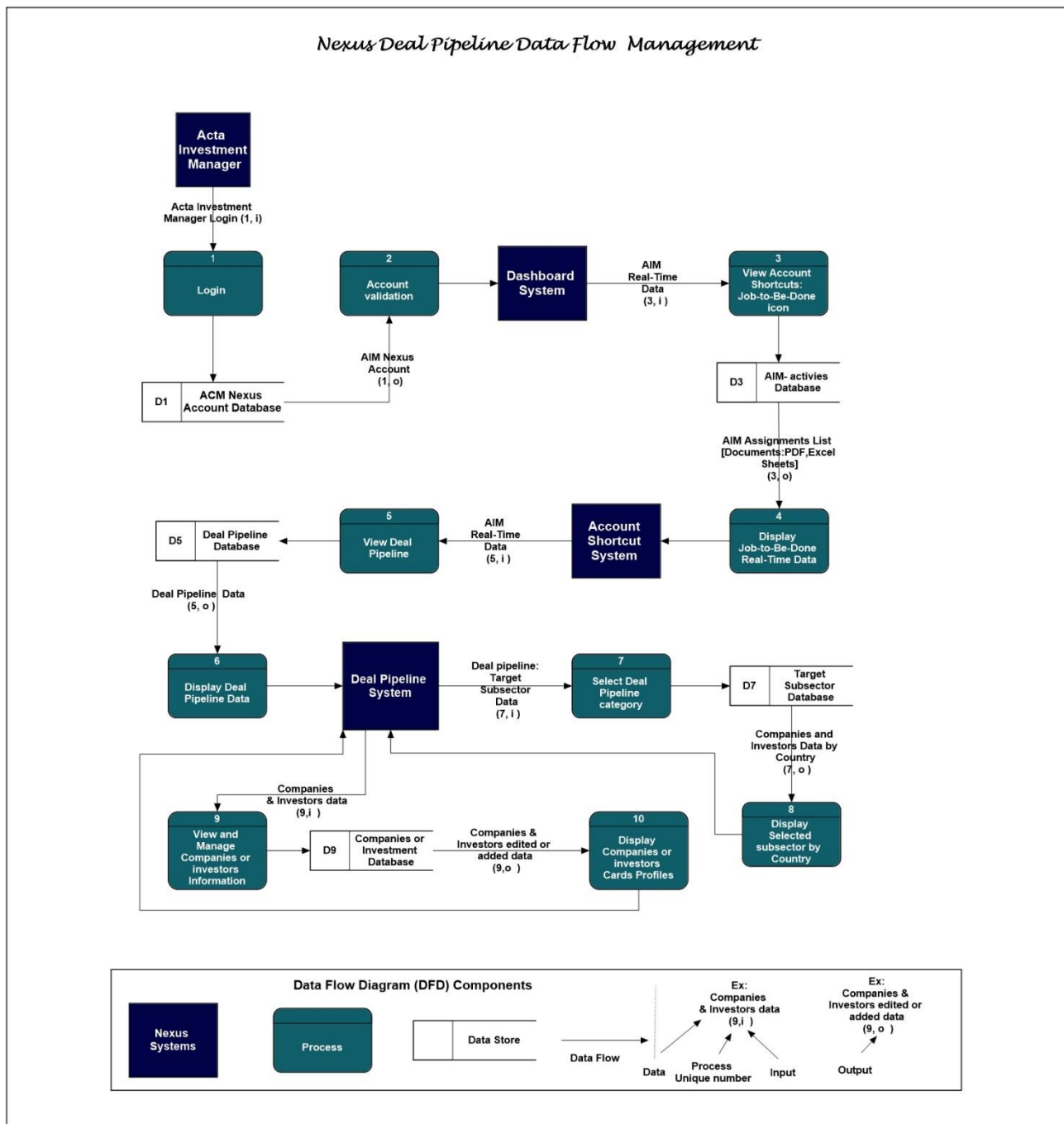


Fig.4.2.1.2 Acta Deal Pipeline Data Flow (Mastering The Requirements Process, Suzanne & James Robertson (2012)

This data flow model reduces manual data entries and minimizes the risk of errors, thereby improving the efficiency of Acta's investment processes.

4.2.1.3 Nexus Client- Server Achitecture

To ensure that Nexus CRM is scalable, secure, and high performing, the client-server architecture has been developed with the following key features:

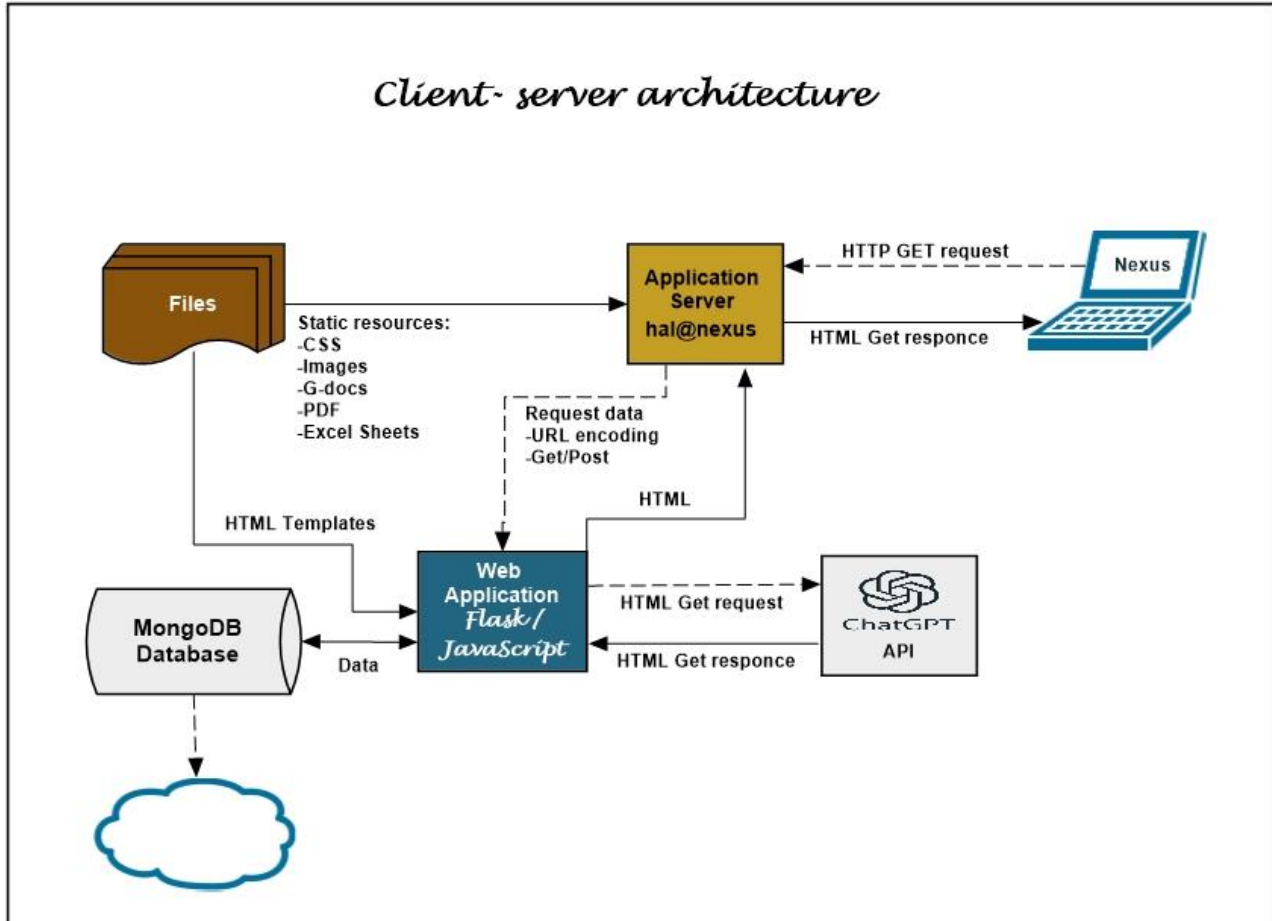


Fig. 4.2.1.3 Nexus Client-Server Architecture (Mozilla Developer, 2024)

- **Cloud-based Infrastructure:** The system leverages cloud technology to provide scalability and flexibility for future growth. This ensures that Acta can handle an increasing amount of data and user interactions.
- **Secure Communication:** Client-server interactions are secured via TLS/SSL protocols, protecting sensitive data.
- **Efficient Load Balancing:** The system is designed to handle a large number of concurrent users without performance loss, which is essential for supporting growth in the user base.

This architecture ensures that the system remains robust and high performing, even as Acta grows.

Implementation Plan and Next Steps

To ensure a successful implementation of Nexus CRM, it is proposed to follow a structured roadmap as previously described in the report (See section 4.2.1). The next steps will include a review of the prototype, data flow model, and client-server architecture with Acta's management to ensure that the system meets all requirements.

It is recommended that we hold a meeting to review the current progress and agree on the next phases of the project, including further testing, user involvement, and adjustments based on feedback.

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Appendix

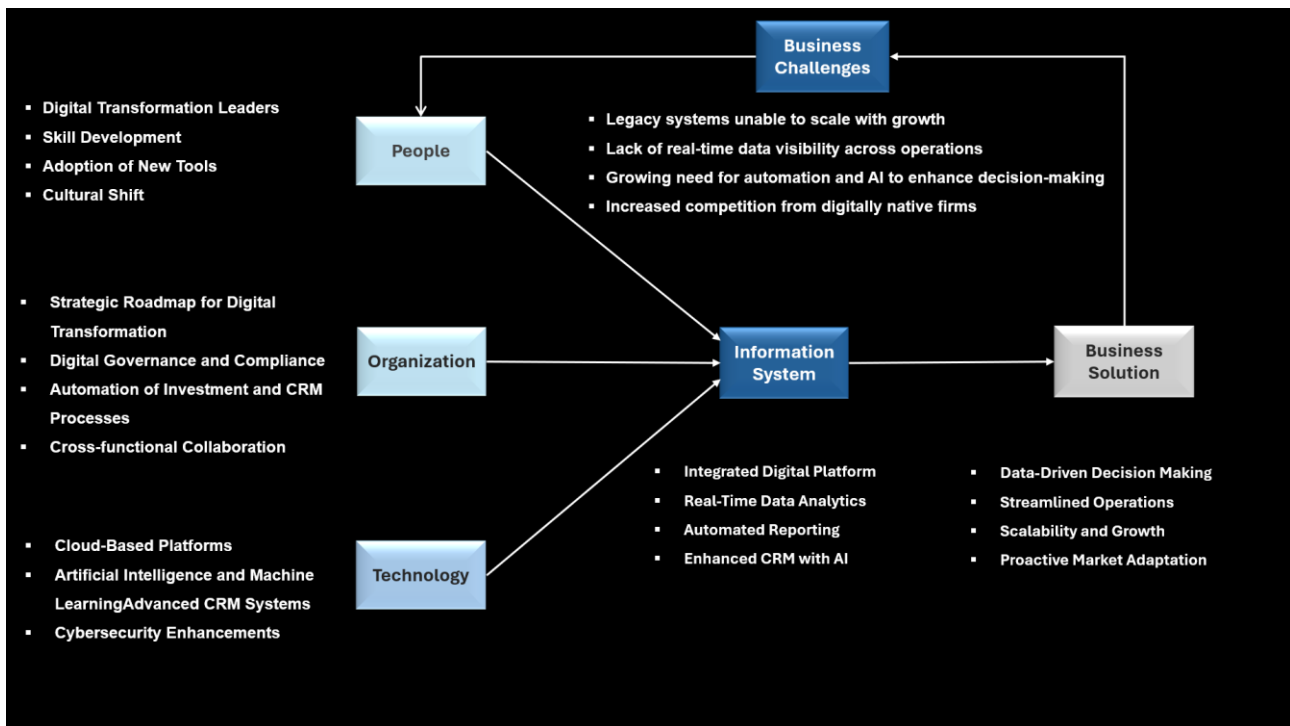


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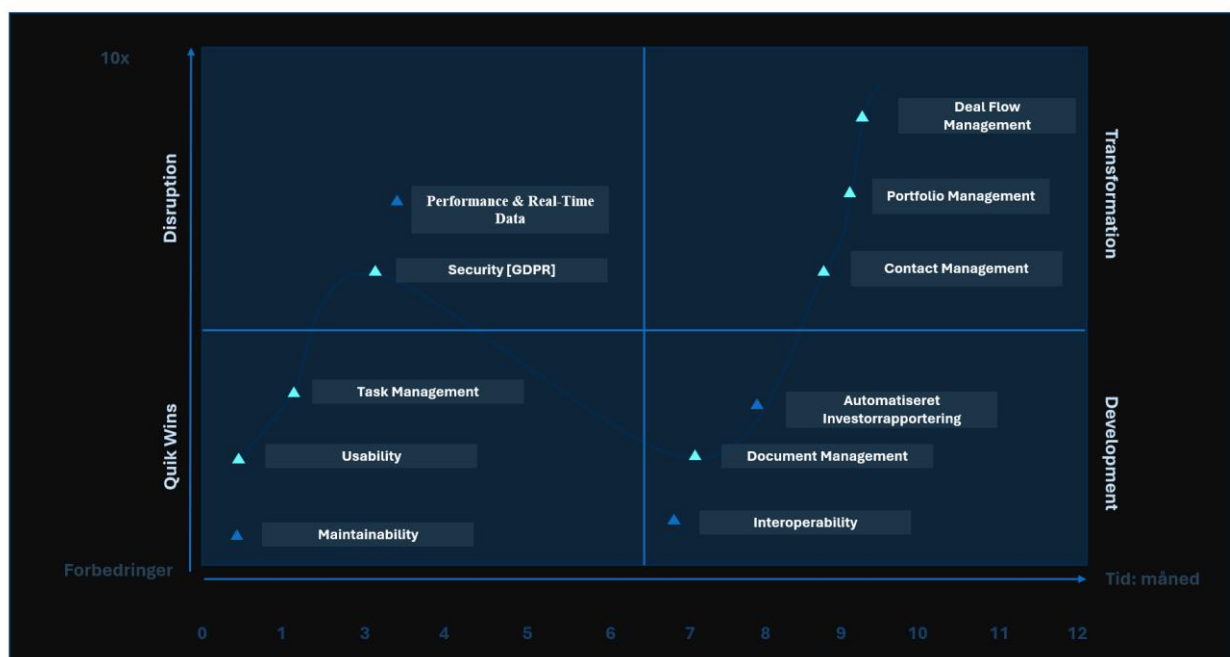


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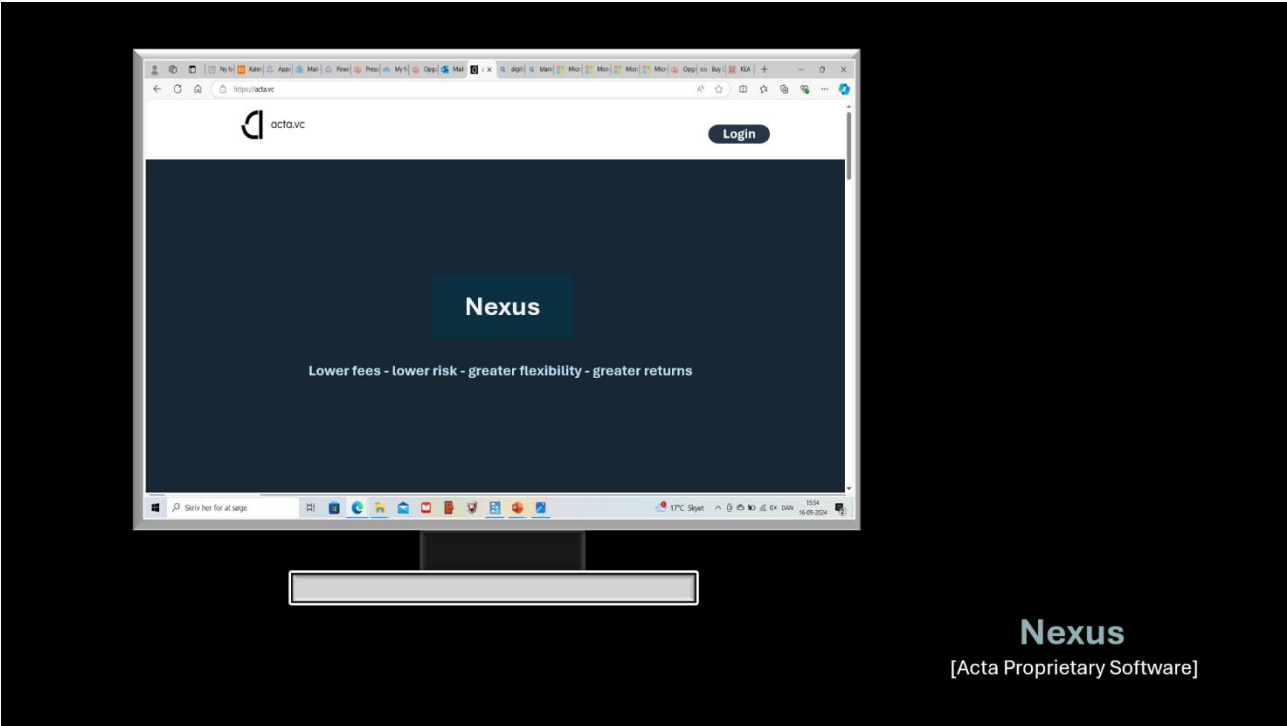


Fig.4.2.1.1a Nexus Login System

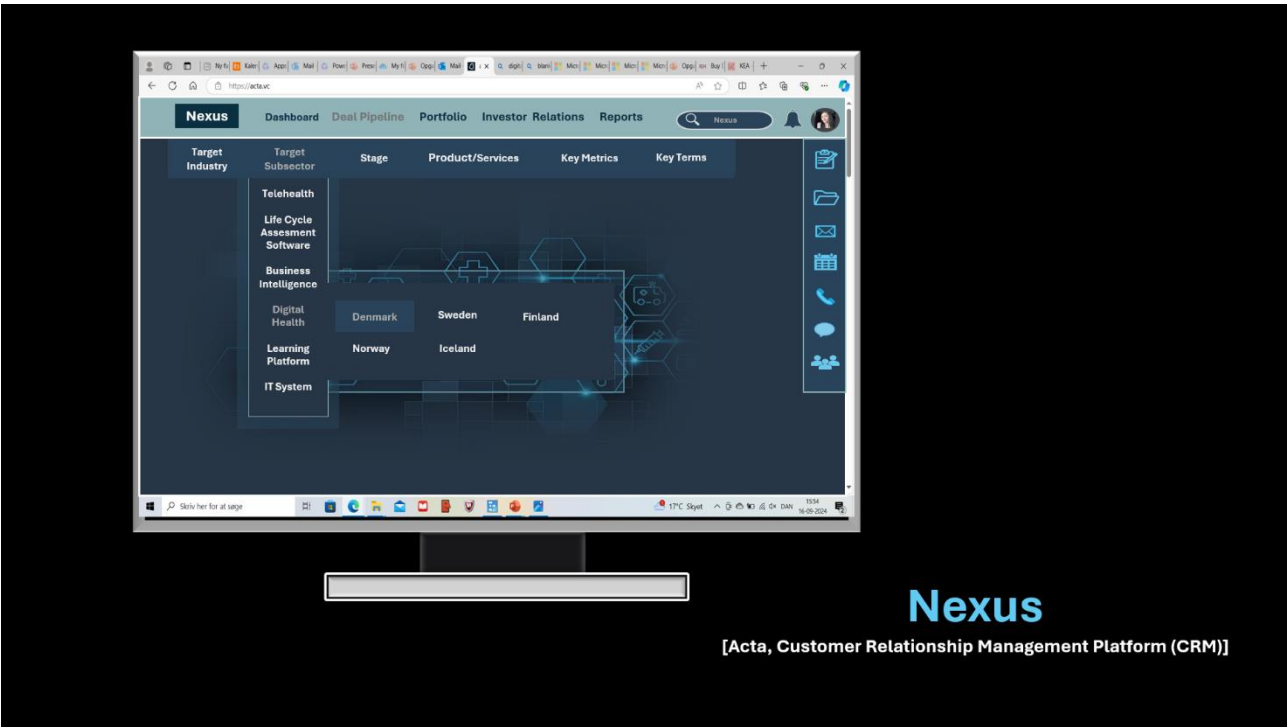


Fig.4.2.1.1b Nexus Deal Pipeline System

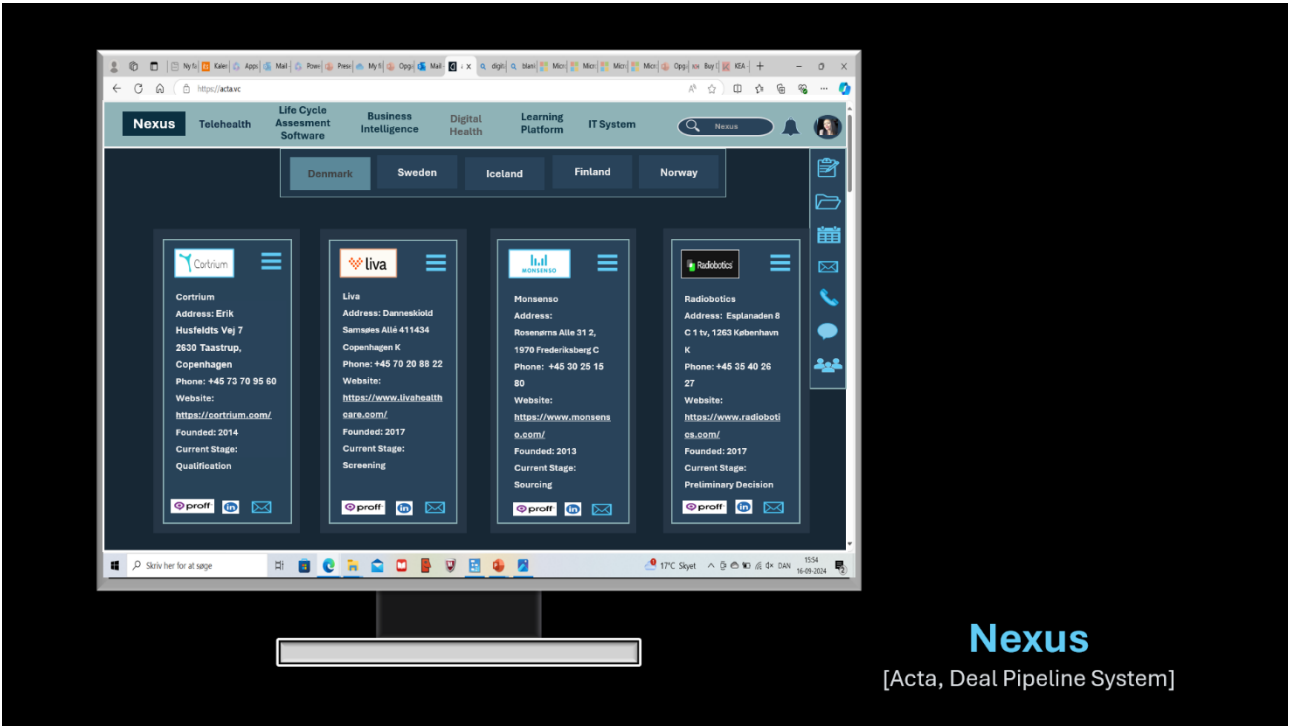


Fig.4.2.1.1c Nexus Deal Pipeline System: Digital Health

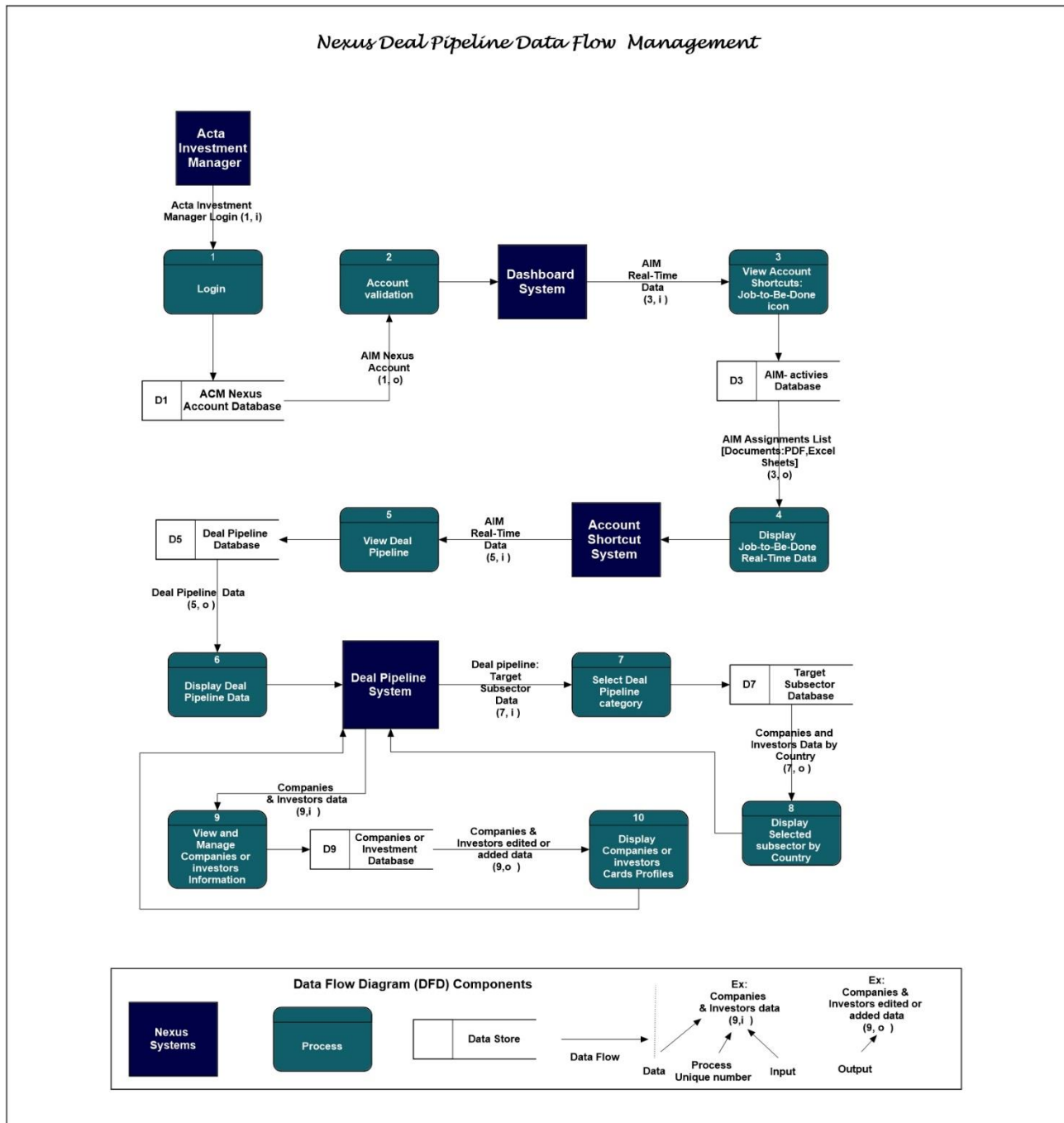


Fig.4.2.1.2 Acta Deal Pipeline Data Flow (Mastering The Requirements Process, Suzanne & James Robertson (2012)

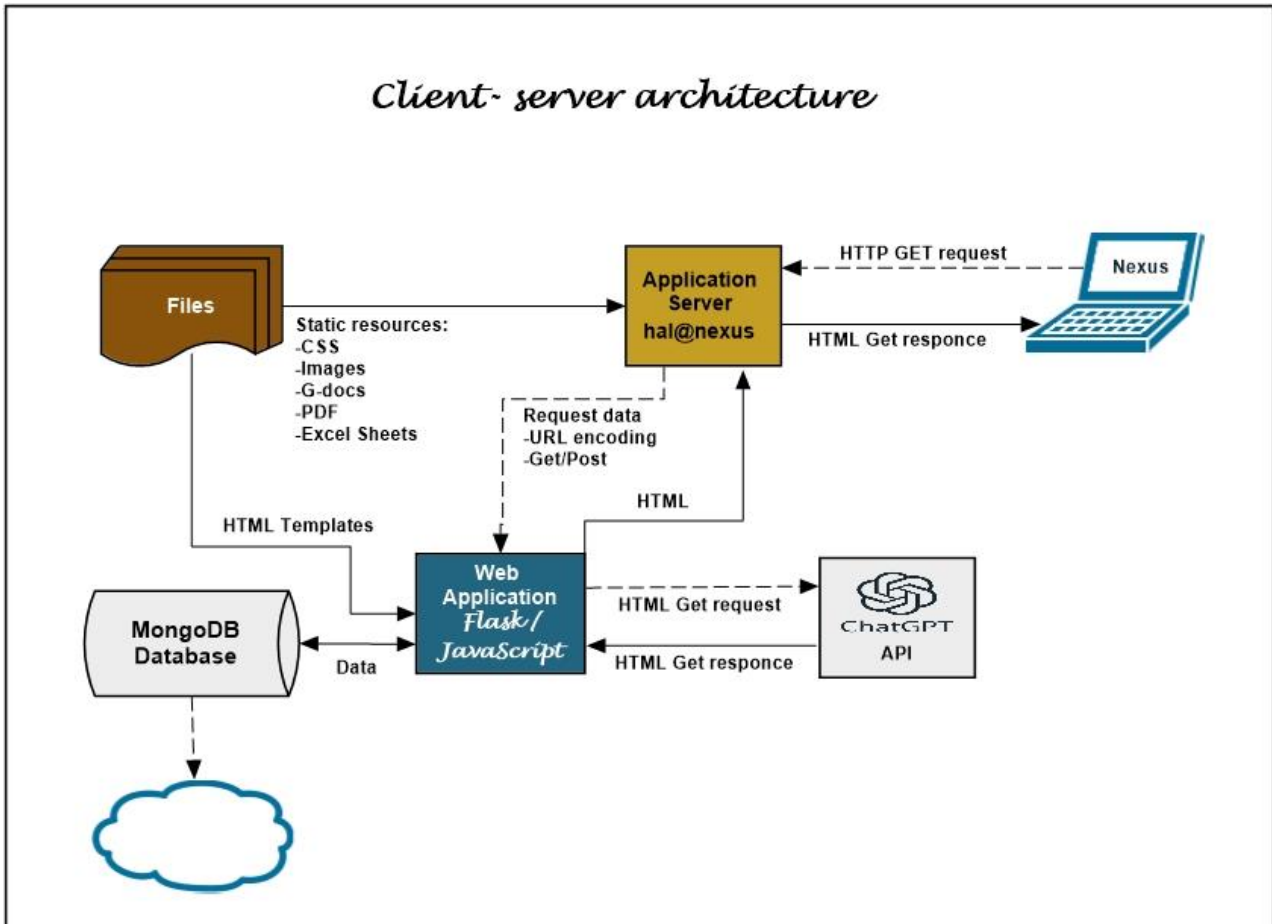


Fig. 4.2.1.3 Nexus Client-Server Architecture (Mozilla Developer, 2024)