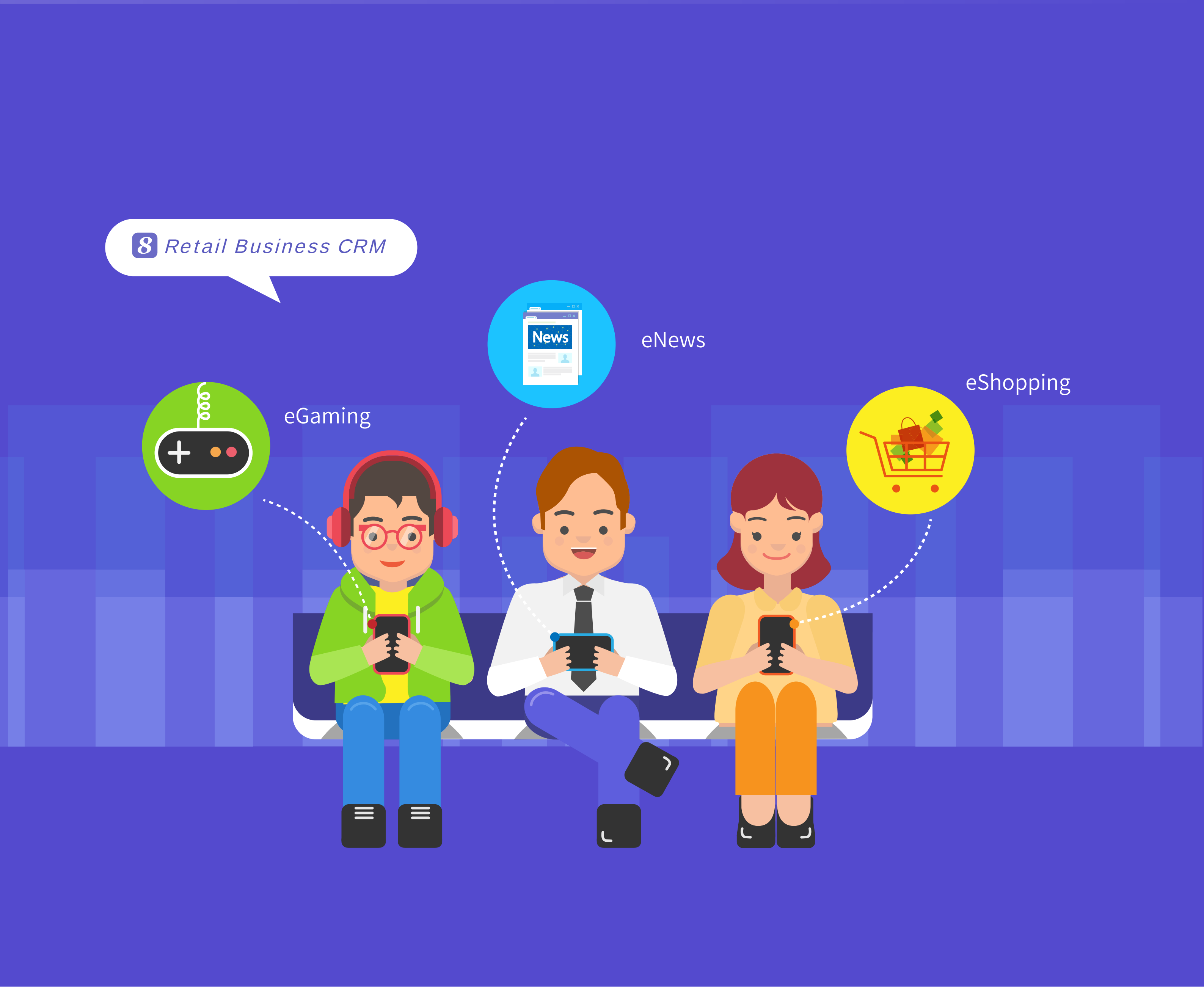
Retail Business CRM

helps companies improve performance in the new retail era



CRM for New Era of Retail

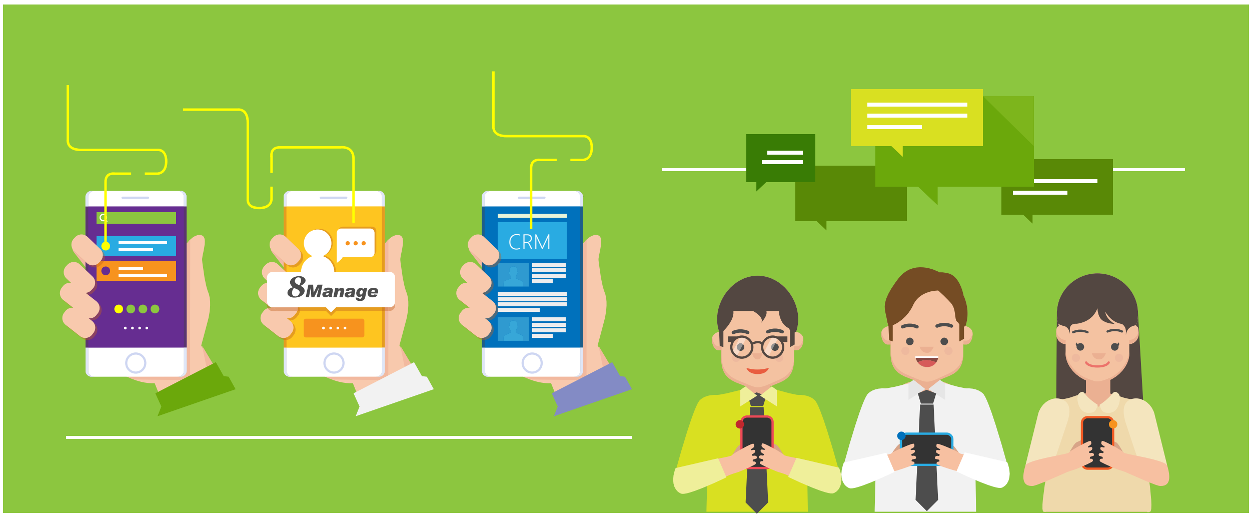
Consumers are embracing the digital technology and the following paradigm shifts are occurring in today's new era of retail:

- SMobile becoming the front door
- Seamless shopping experience
- The arrival of the subscription economy
- Using behavior analytics to understand markets and direct sales

8 CRM provides the following features for businesses to deal with the paradigm shifts:

- Mobile marketing
- Lead nurturing
- Data collection & deeper analytics
- Seamless shopping experience (Integration of online and offline)
- Subscription business
- Smartphone-Tablet POS
- Connecting the team & task management

Mobile Marketing



People spend more than 4 hours daily on their mobile phone. The time spent on the phone is a mix of time spent on social media, e-commerce, searching and browsing. This provides a clear and important opportunity to capture the attention of consumers.

8 CRM provides the following features for mobile marketing:

Mobile-first Indexing

8 CRM provides the framework to create a site that can reflect the proper content and perform well. Pages can be loaded quickly and use responsive design – meaning that the site senses what size and shape device it's being loaded on.

The framework controls the photos and text to appear where they should and the buttons need to work with touch screens.

Social Media Marketing

8 CRM is fully linked with WeChat and capabilities are completely customizable. You can select from intricate demographics including everything from profession to interest to geographic location. This sort of targeting option helps to ensure that your brand is spending its advertising dollars on only the most relevant users that are going to be most likely to have an interest in your brand and follow up with a purchase

Personalization

8 CRM allows you to leverage data analysis and digital technology to deliver individualized messages and product offerings to current or prospective clients. 8 CRM allows you to create personalized content for individuals or a selective demographical group. Personalized marketing gives customers a sense of identity. They cease to be one of the masses, and instead become an individual with unique wants and needs.

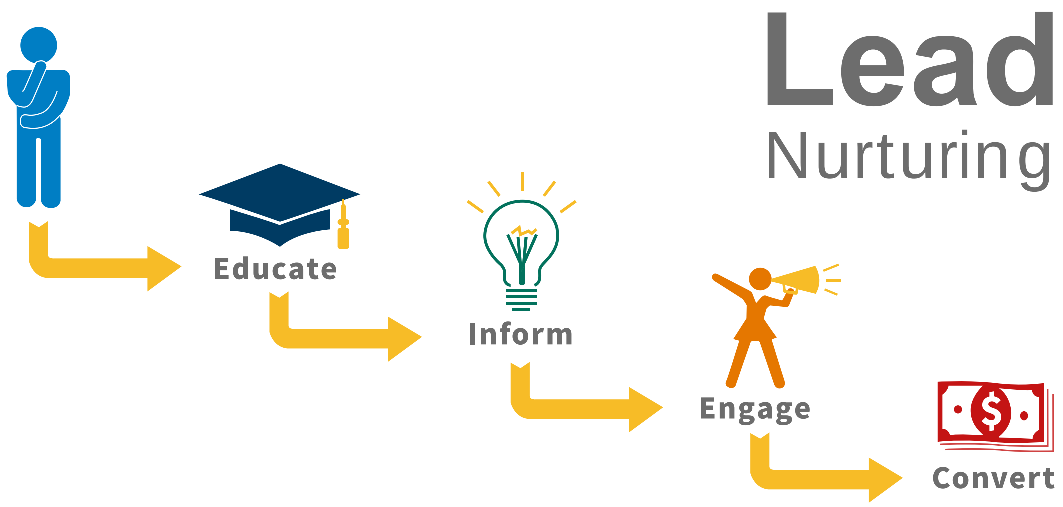
Mobile Pay

Mobile marketing and mobile commerce often go hand-in-hand. Consumers are using mobile pay to purchase items after they like what they see in mobile marketing. 8 CRM supports various mobile payment methods to allow you to link mobile commerce with your mobile marketing seamlessly.

Lead Nurturing

Leads come in many forms from different channels, such as organic online leads, newsletter signups, event participants, new customers, social leads, B2B leads and more. 8 CRM provides you with information such as when your leads have entered the pool, how often you have engaged and nurtured them and what steps you can take to vet them.

8 CRM helps you to segment your clients into groups sorted by age group, gender, professional fields, income level, interests, spending history and so on so that your marketers and sales agents are able to communicate with your clients in the best suitable way.

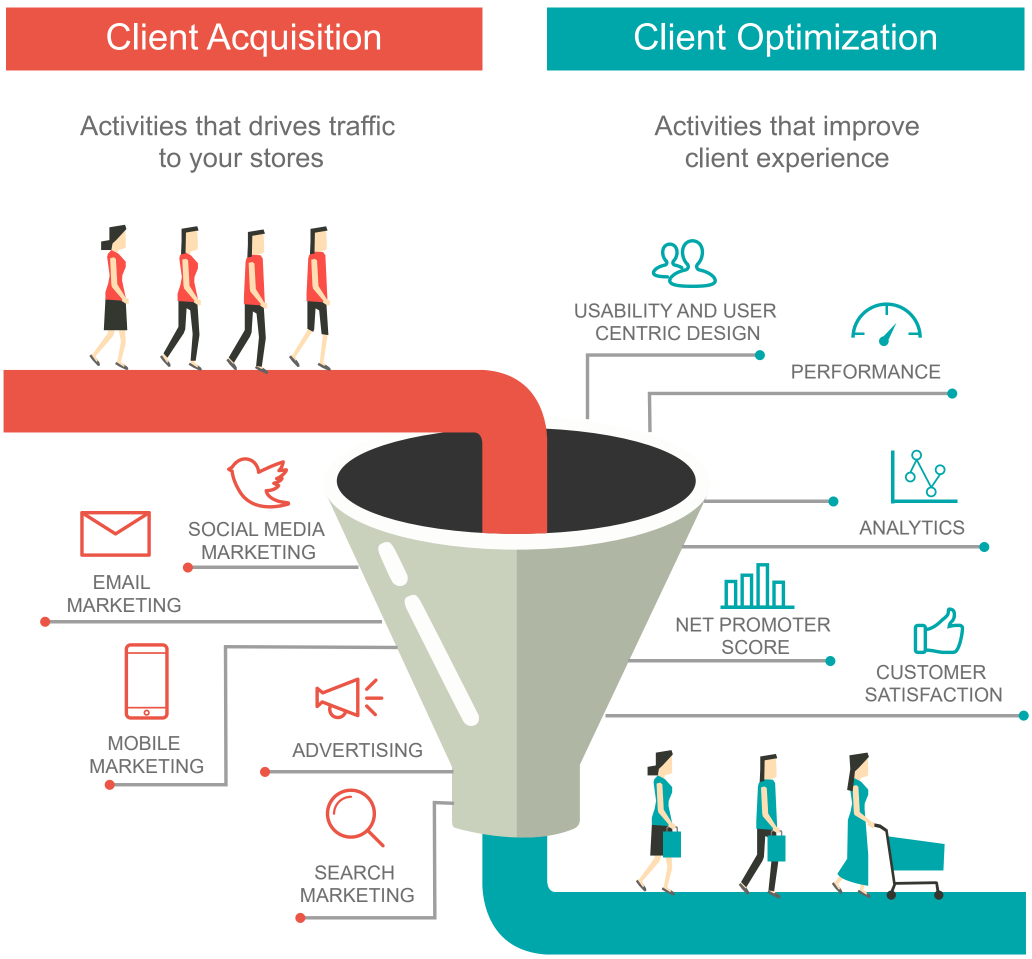


Guiding a lead through the buying process is the key in successful sales operation. 8 CRM can help you to nurture, guide and catalog decisions made through the process will allow you to see both the strengths and weaknesses of your current sales process.

8 CRM can also provide you deep insights into how many clients visited your online stores and leave without placing an order for items that they added to their cart and your system can send polite reminders or your sales team follow-up with calls.

Data Collection & Deeper Analytics

Collecting client data is the single most important key in your marketing strategy. Without data and analytics, you're marketing blindly, hoping to reach your target audience or persona. Even after clients are acquired, they are ever changing. What your customers loved five years ago isn't what they want today. To stay in touch, you need to constantly collect data to continue marketing to your existing clients.



Client data gives you the opportunity to improve your client experience and in turn improve your client satisfaction and revenue. 8 CRM allows you to collect the following types of client data:

Communication Related

• Client name

• Contact types and details – email id, physical address, phone number

• Source of acquisition

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Transaction Related

• Items purchased

• Value of the sale

• Time of purchase

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Interaction Related

• Does the client respond to the emails and sales calls?

• What categories of topics of the eDM or eSurvey does the client respond most often?

• Record of calls made to the help desk

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Client Profile

• Birthday of the client

• Region

• Hobbies & Interests

• Income levels

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Feedback

• Survey results the customer has taken

• Complaints the customer has left

• The products that were returned

. . .

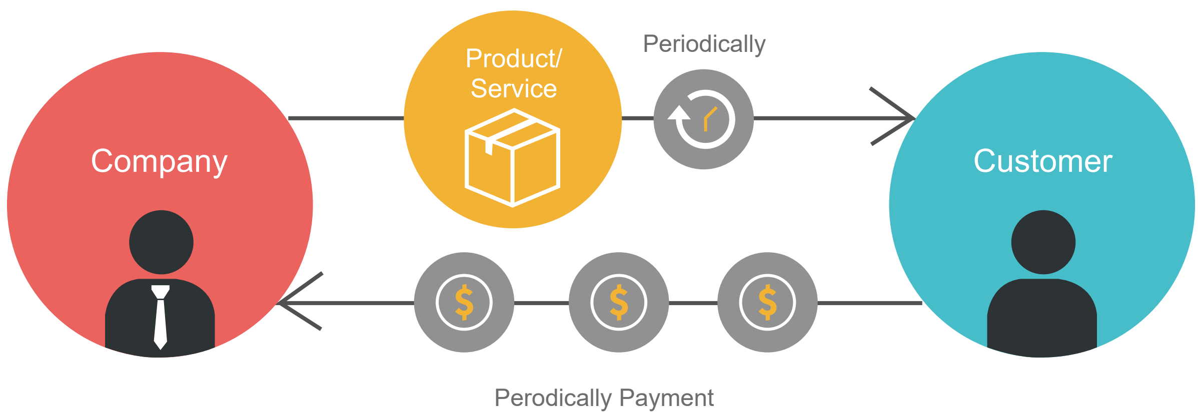
According to survey, 65% of consumers are happy to share their information in exchange for more targeted marketing and 67% are willing to share their data if they receive some form of benefit, such as discounts, it is up to you to make the client data and deeper analytics to improve the effectiveness of your marketing and clients' experience.

Seamless Shopping Experience (Integration of Online & Offline)

In the new era of retail, consumers want to shop on their terms, through the channels they choose and with the information that they control.

8 CRM provides you a framework to integrate your online and offline stores, products and services so that the degree of seamless that your client will experience is totally under your control.

Subscription Business



8 CRM provide you the following features to manage your subscription business and service delivery:

Before eContract is established

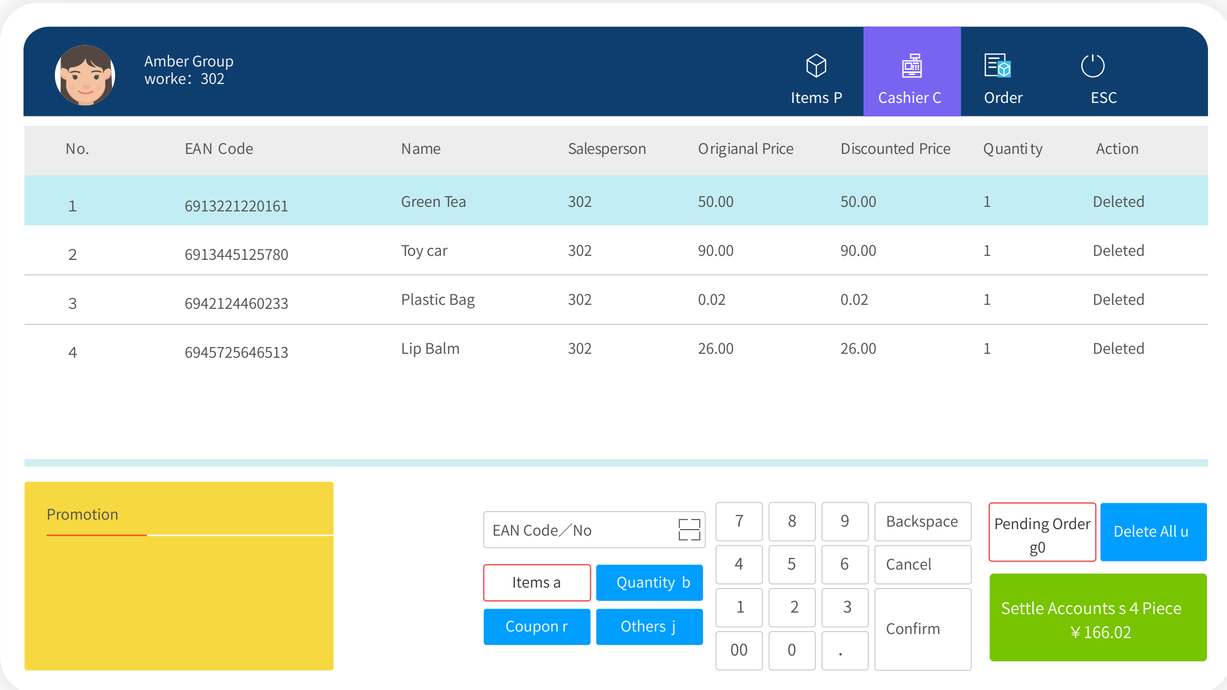
- Establishing a new eContract of a pre-defined type with each new client subscription
- Specifying (or altering from pre-defined) terms-and-conditions in the eContract that the system will automatically track

After eContract is established

- Automatic or manual-triggered delivery accordingly to the transaction-contents and terms-and-conditions of eContract
- Automatic tracking of Service Level Agreement (SLA)
- Automatic issuing of invoices and tracking of payments
- Automatic alerting of renewal

8 CRM also supports master-and-sub eContract models for the support of more sophisticated subscription models.

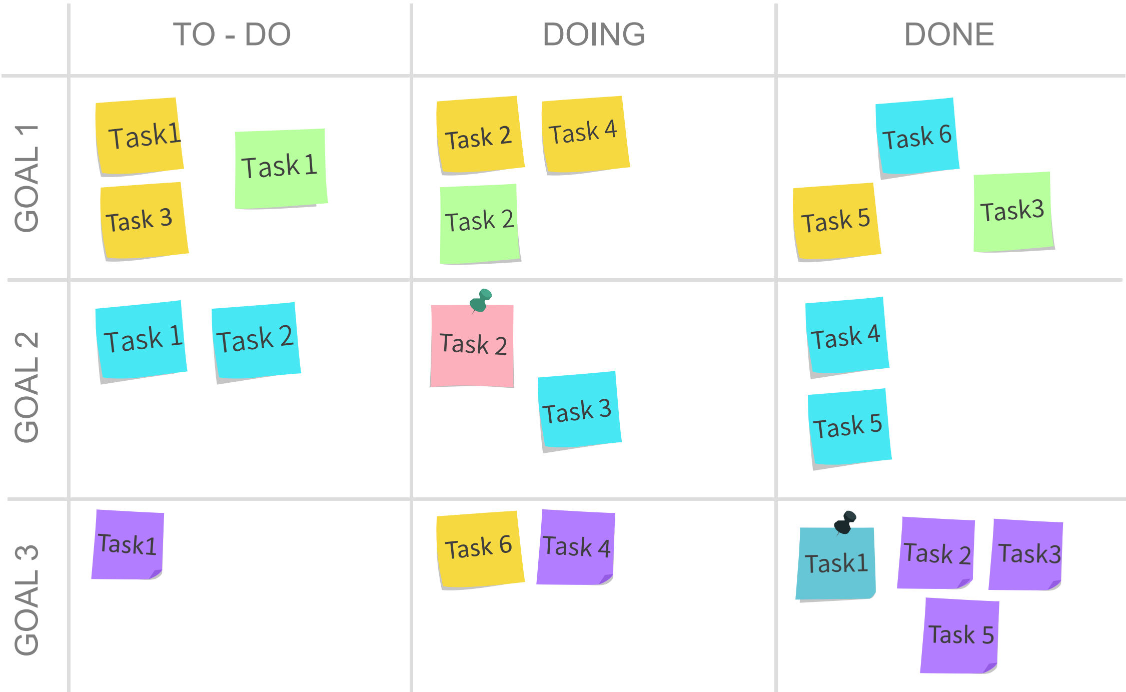
Smartphone-Tablet POS



The 8 CRM mobile POS is both affordable and easy to use, and do more than just process sales and accept payments, as they include time-saving features that help you analyze your sales data and manage your inventory, staff and clients. It also has integration for email marketing, loyalty programs, and other capabilities that make it easier to run and grow your business.

Connecting The Team & Task Management

A business is only as good as its core team. 8 CRM provides team chat and tagging and allows your entire team to access to your analytics, client data, trends and more and can chat in real-time with file-sharing while reviewing any pertinent data from their end. This equates to time saved, progress achieved and productivity enhanced.



8 CRM also supports simple task management and allows your team to work effectively on projects.

Feature List

Feature	Description
Client Mgmt	
Client Info	Allow the user to define different sections, fields and field locations in the client general info page. Basically the user can design the layout of client general info page.
	Allow to record contact info of different contact types, different contact methods and different contact addresses for different purposes (e.g., invoice, shipment, service and payment).
	Allow user-defined client qualification criteria and methods.
	Allow to assign people to different service roles relationship manager, sales rep, account manager, delivery manager and service rep to service the client.
	Allow to log all product-based or requirement-based interest and marketing info of the client.
	Allow to log all interaction and transaction info of the client.
	Allow the user to define the fields and scoring methods representing the value of the client and the value score for each client will be automatically calculated.
Lead Mgmt	Support quick recording or importing lead info.
	Support auto assignment of leads to sales reps based on pre-defined rules.
	Support public pool for the leads that have been removed from the sales reps and are up for grabs.
	Support user-defined qualification criteria and scoring method.
Conversion Mgmt	Allow to track conversions such as lead to first-time-client, first-time-client to repeated-client, repeated-client to reference-able client and active-client to inactive-client.
Search & Data Mining	Provide basic search based on fields such as size, region and industry defined in the general info page.
	Provide advanced search based on fields defined in the following categories: a) General b) Responsible Parties c) Interest d) Value e) Interaction f) Behavioral g) Special info
Related Party Mgmt	Provide advanced search based on fields defined in the following categories: a) General b) Responsible Parties c) Interest d) Value e) Interaction f) Behavioral g) Special info
Abandon & Blacklist Mgmt	Manage the abandoned and blacklist clients.
Alert Mgmt	Allow the user to set the follow sets of alert rules: a) Lead without qualification b) Lead without sales rep c) Lead without interaction d) Lead with no follow-up action e) Initial client interact date f) Lead with no change of status (e.g., for prolonged period of time) g) Qualified lead has zero opportunity h) Lead/client has more than N open opportunities i) Existing client without account manager j) Sales rep has created less/more than N leads k) Client value care alert
Standard Reports	a) New lead report b) Lead qualification exception report c) Lead progress report d) Client progress report e) Sales stage progress report f) Group performance report g) Sales volume report – multiple client h) Membership report i) Member purchase report j) Member quantity report
Import & Export	Support batch import and update of massive client records.
	Support export of client info to Excel or PDF.

Access Privilege Mgmt	**Record level access control:** a) Provide access control by enterprise-wide, group-wide and individual client. b) Allow different roles/users to access the following different parts of client info: - Campaign - Opportunity - Order - Invoice - Payment c) Allow the manager to view subordinates' client info. **Field level access control:** a) Interaction b) Revenue
Audit Trail	Provide audit trail on client info changes.
Marketing Campaign Mgmt	
Campaign Planning	Allow the user to specify the campaign basic info such as name, id, type, responsible parties, schedule and approval flow.
	Allow the user to specify the following promotion info: a) Theme b) Marketing topics c) Audience d) Key message e) Product, product family or others f) Promotion offer and terms
	Track the following investment and return: a) Campaign budget b) Expected results which can be one of the following: - # of leads - # of qualified leads - Amount of revenue - Others c) Expected return date
	Support pre-defined templates for quick creation of campaign project schedule.
	Support full budget planning and tracking.
	Support user-defined campaign approval flow.
Campaign Preparation	Support the following campaign execution channels: a) Email b) SMS c) Telephone d) FAX e) Regular mail
	Support content mgmt: a) Content template b) Content variation c) Selection of contents for personalization
	Support content editing with HTML, CSS, picture insertion, hyperlink, attachments etc.
	Target audience can be identified by region, industry, interest area, marketing topic. Target audience can also be further filtered by contact's personal info such as age, marital status, education level, salary range etc.
	Provide sophisticated search mechanism based on fields defined in the following categories for the user to identify the massive campaign targets from the database a) General b) Responsible Parties c) Interest d) Value e) Interaction f) Behavioral g) Special info Also, recipient lists in Excel or CVS format can be imported to formulate the target list.
	Support content personalization at the following two levels: (a) The user can send specific content to a particular type of receipts (b) Each receipt in a particular type of receipts can receive a unique content
	For eMarketing (email and SMS), both fully automated and manual methods are supported. For the automated execution, the user can pre-set scheduled send time and batches.
	Support to pre-set execution rules to automatically send out customer caring emails/SMS messages on client's important dates such as birthday, anniversary etc.
	Automatic tracking of eMarketing execution results: Allow the user to view email/SMS are successfully sent, opened or clicked-through; if the sending failed, the system will provide failure reason for analysis; opt out records are also provided.

Campaign Execution	Multiple campaigns can be executed and tracked in parallel.
	Provide project mgmt as add-on for campaign project mgmt and event mgmt.
	Provide campaign alerts notification, include issue, risk, budget updated, budget overrun, target achievement etc. to remind responsible people of their campaign work.
	Provide real-time business map and dashboards for the executives to view the campaign execution conditions.
	Provide issue and risk records for the marketing team to know about the campaign conditions.
	Able to track the target results and non-target results (side benefits) of the campaign.
	Able to track investment and return in real-time and the user can drill down to view details.
	Able to compare campaign budget and actual cost and generate cost overrun warning in real-time.
	Support Reality Checks and eSurvey questionnaires for the brand popularity, audience's feedback etc.
Campaign Performance Evaluation	Provide real-time budget-vs-actual and cost-benefit & ROI analysis with breakdown by cost classification, channel, subentity, line-of-business, product and responsible person. Also, provide the following detailed reports: a) eDM interim results (e.g., email sent, email opened and email read) b) Other campaign interim results (e.g., visitors, members, leads, opportunities, transactions) c) Campaign final results d) Campaign status summaries
Sales Mgmt	
Sales Planning	Allow user-defined sales stages and funnel measures.
	Support automatically allocation of sales reps to new clients based on industry and region.
	Allow to create sales assignment in sales calendar.
	Support scheduling sales meeting and visit arrangement.
	Provide automatic alert to remind scheduled activities.
	Supports automatically tracking activity result.
	Provide client interaction mgmt on the followings: a) Interaction purpose b) Schedule c) Sales stage d) Interaction type e) Key decision makers f) Result g) Follow-up actions
Quotation Mgmt	Support quotation management: a) Easy of quotation creation based on info in product master b) Metrics-based authorization and allow user-defined quotation approval flow based on department/team c) Track quotations sent to client d) Allow automatic conversion of quotation to sales order
	Support quotation print-settings and export to Excel or PDF.
Order Mgmt for Consumer Products	Provide order management for consumer products: a) Order creation based on info in product master or one-time products b) Metrics-based authorization and allow user-defined quotation approval flow based on department/team c) Track orders in different status, including planned, official and closed d) Linkage between request from inventory & receive from inventory with shipping arrangement in order e) Track of goods return f) Support satisfaction check for each order
	Support order print-settings and export to Excel or PDF.
Revenue Budgeting, Sales Quota & Commission Mgmt	Allocation of sales quota to different salesmen/sales teams/departments by batch input for each revenue item.
	Monitoring of sales quota achievement of each salesmen/team as well as achievement percentage based on quota.
	Support drill-down of figure to view details of sales orders.
	Support setting annual, quarterly and monthly sales targets and quota for specific sales representatives in specific groups.
	The achieved quota of each sales representative or group can be tracked in real-time.
	Support KPI Mgmt and real-time variance tracking of quota and achieved quota.
	Provide commission calculation based on either a user-defined commission program or commission input in each order.
	Support tracking of sales commission achievement based on month/quarter/year.

Revenue Pipeline Mgmt	Provide pipeline management to count % of confidence level from sales opportunities: a) Tracking of payment received and outstanding invoice based on quarters on one screen b) Provide drill-down of figures to show details of payment received/outstanding invoices c) Aggregation of revenue pipeline information to from subgroups to headquarters d) Out-of-box pipeline display components, including pipeline bar chart and pipeline trend graph
Invoicing and Payment	Provide convenient invoicing and payment functions: a) Generation of invoice based on payment terms b) Batch handling of invoices to a client c) Batching handling of payment received from client to settle multiple invoices of a client for different orders d) Linkage between invoice and payment e) Provide invoicing alert based on payment terms f) Provide detailed tracking report for invoice and payment
Product Mgmt	
Product Master	Allow user-defined product types, families, sub-families and brands.
	Support auto generation of product ID based on user-defined rules.
	Support both global product view and group-oriented product view and access control.
	Able to store and maintain product info such as product type, product family, product name, product ID, product supplier, product price info in Product Master.
	Support to add user-defined fields in the product basic info page.
	Support packaging specification and quantity control.
	Support product costing based on purchase price or manufacturing cost.
	Support product pricing based on cost plus margin or list price minor discount.
	Support multiple price and discount rules based on client type and volume.
	Able to record up & cross sell product info.
	Provide inventory mgmt: a) Track demand from sales orders b) Track supply from shipment info c) Track inventory movement and current quantity d) Support periodical stock check
	Support serial number or other identification mgmt.
	Allow user-defined product approval flow.
Product Analysis & Evaluations	Allow to analysis and evaluations of # of Clients, Total # of Campaigns, Presale ROI, Total Product Cost, Gross Profit, etc.
Product BOM	Provide BOM for managing the creation of a product from raw and WIP materials or a bundled product from sub-products. The materials and/or sub-products are specified as product's components and offspring.
	Every component can be selected from Product Master and the system will automatically carry the component info such as name, ID, model, price to the BOM.
	Provide visualized tree structure of the product BOM and allow the user to edit.
	Allow to import BOM info from template to create product BOM without the need to rekey in the info.
	Product BOM can be linked to opportunity, and project (if project mgmt is used as add-on).

Membership & Loyalty Mgmt	
Design Your Own Membership and Loyalty Program	Allow user-defined different programs and different types of membership within each program.
	Allow user-defined membership numbering rules and reserved membership numbers (e.g., 888) for VIP in each program.
	Allow user-defined award and promotion rules for different types of memberships, different geographical locations, different time periods, different products and different awards (e.g., gifts, coupons, discounts and points) in each program.
	Allow user-defined aging and redemption rules for membership points in each program.
	Support membership creation, upgrade and termination in each program.
	Support membership card and membership fee management.
	Support interface to POS to record all transactions for each member.
	Auto customer care on special events (e.g., birthday, anniversary) and auto notification on special promotions.
Membership Self-service	Allow members to view their transaction and accumulated point summary and use their points to exchange the awards that they want.
Analyzing Reports	The membership & Loyalty management reports include: Membership Report, Member Purchase Report and Member Quantity Report.
Client Analysis & Embedded Business Analytics	
Client Analysis Reports	New Lead Report Lead Qualification Exception Report Lead Qualification Report Lead Progress Report Client Progress Report Sales Stage Progress Report Group Performance Report Sales Volume Report-Multiple Client Monthly Client Conversion Chart Client Source Type Chart Top 10 Clients By Revenue Chart
Embedded Business Analytics	Allow to define client behavior database based on the industry requirements.
	Provide online e-survey to acquire valuable client behaviour data.
	Support collecting client behaviors and updating client behavioral database.
	Provides analysis report based on client behaviour and customized marketing analysis report via multi-dimensional search engine.
	Allow email campaign base on the client analysis results.
Other Assisting Functions	
Sales Expense Mgmt	Trip or expense request and approval flow.
	Expense advance and approval flow.
	Expense report and approval flow.
	Expense request, expense advance and expense report auto linking and netting.
	Bursar and reimbursement mgmt.
Knowledge Base	Provide framework for building up knowledge base.
	Allow easy access of knowledge from the knowledge base.
eSurvey for Client Satisfaction	Support user-defined questions and scoring methods in eSurvey.
	Allow clients to participate eSurvey online and auto calculate the scores.

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- 8 **EDMS** : Electronic Document Management System
- 8 **OA** : Office Automation
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