

# *“Experience Sharing: Customer retention and Effectively Measuring Results the CRM way”*

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# Hong Kong's Business

## ■ Production and Logistics

- Product design & manufacturing
- Administration
- Other supports

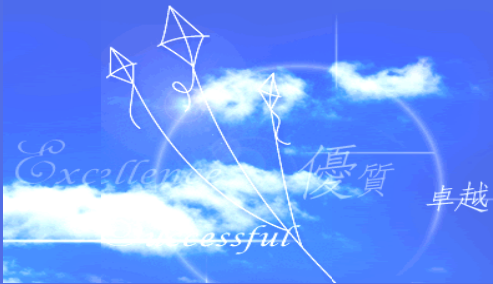
Can be outsourced and moved to elsewhere



## ■ Front-line contact with customer

## ■ Hong Kong's role

1. Customer Service Management
2. Project Management



# Support in business pipeline

## ■ Before

Business Pipeline



<b>Business Opportunities (leading tools)</b>	<b>Business Fulfillment (lagging tools)</b>
	<ul style="list-style-type: none"><li>■ ERP</li><li>■ MRP</li><li>■ Accounting System</li><li>■ .....</li></ul>



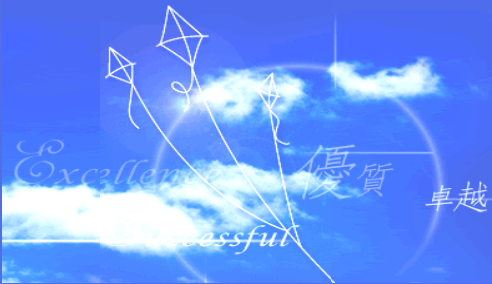
# Support in business pipeline

## ■ Now

Business Pipeline



<b>Business Opportunities (leading tools)</b>	<b>Business Fulfillment (lagging tools)</b>
■ CRM become the leading tool to fulfill up the gap	■ ERP ■ MRP ■ Accounting System ■ .....



# Contact and Intelligence Management

- CPA Australia estimated HKD 10 billions loss due to last year's staff turnover in HK
- The actual loss can be even bigger for corporations due to:
  - Business opportunities loss
  - Customer relation loss

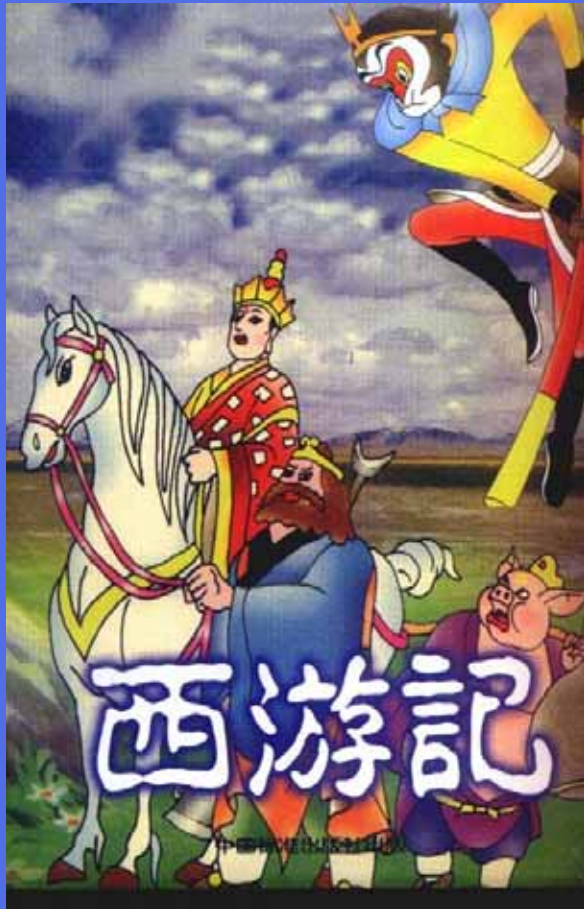


\*Source: 20050927 SingTao Daily



# Story of “Journey to the West”

If the Master is the CEO, who would be the best Administrator in the team, and who would be the best Sales for the team?



# The Use of CRM

- Just like Monkey King, CRM would be likely the ring on its head. No matter where he is, master can easily control him.
- Also CRM would act as “Monk” to be the backup function that the frontline staff can assign tasks to them for support.





# The Use of CRM

## ■ Keep Track

- As CRM is running in web basic, no matter the sales and marketing where they are, they can ease access to the CRM through Internet. No matter where are the Sales located, the owner can keep check on their Sales and Marketing activities through CRM



# The Use of CRM

## ■ Forecast

- Base on the information input form the Sales in CRM, owners can estimate the revenue they would gain in the coming few months and they would have direction to focus on
- Through the CRM, owner can monitor their Sales activities, analysis and forecast their performance.

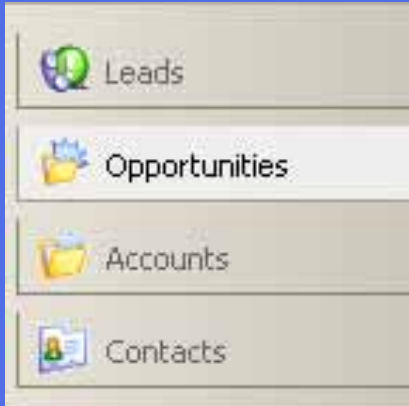
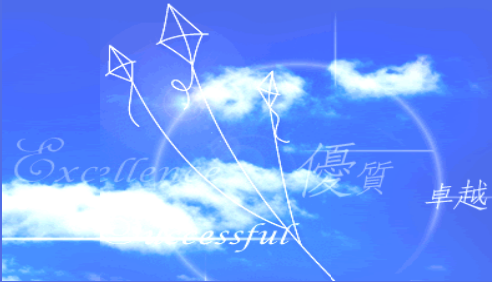


# The Use of CRM

## ■ Won't lost Clients' Contact

- In traditional Sales business, only the Sales maintain the Clients contact information. Once the Sales leave, all the contact information would lost. But now through the CRM, owner could keep the clients contact in the database.

# Sales Input



<b>Industry</b>	<input type="text"/>	<b>Lead Source</b>	<input type="text"/>
<b>Product</b>	<input type="text"/>	<b>SalesStage</b>	Default Value

- Sales should input all the necessary information for management use.



# ***Why TQM adopted CRM***

- **We need a system to manage our Sales and Marketing information**
- **We can share the information in CRM with other staff**
- **Data Analysis for Lagging and Leading issues.**



# Benefits

- Centralize all Sale and Marketing information in single data source
- Keep track on business opportunities
- Based on the KPI reporting, we can allocate our resource on the targeting area
- Leverage existing IT infrastructure for easy management



*Thank You !*