8Manage CRM Corporate Info

A Real-time customer information database can help users

capture and store different types of information

Real-time Information Repository

The center of 8Manage Corporate Client Business CRM is the real-time client information repository which has a powerful pre-built structure for capturing, storing different types of information as shown in the diagram below and then filtering and displaying the information in real-time according to user preference. Once a datum in the client repository is updated, its related data in the repository are automatically updated in real-time.

The data in the client repository are also linked to the data in other repositories such as the sales force repository and service center repository. For example, when a contract item is fulfilled, the corresponding sales revenue and service item information will also be automatically updated in real-time.

The client information repository provides the accurate and up-to-date information for different users such as sales reps, account managers and service desk personnel to communicate and service the client.

① Corporate Client's Lifecycle Support

8Manage Corporate Client Business CRM can capture all important information of your corporate client to support your marketing, sales, delivery, and support activities and billing. It also allows you to start with the minimum information such as business identity and contact name of your potential client in its new lead stage and gradually build up its information in the subsequent stages of the lifecycle. Specifically, 8Manage Corporate Client Business CRM maintains the following types of information of a corporate client as well as allows you to define new information sections and new fields:

- Corporate client' s basic info
- Corporate client' s contact details
- Corporate client' s interests and preferences
- Corporate client' sfinancials and credit info
- Corporate client' sinteractions, issues and actions
- Corporate client' s transaction history and values

Lead & Client Lifecycle

Maketing

Account Mgt

Contact
- Lead mgt
- Opportunity
- Contract

Delivery

Billing & Support
- Project mgt
- Revenue Recognition
- SLA

8Manage Corporate Client Business CRM supports notes and attachments that can be used to capture the details of a service call, client support needs or warranty information. In this way, the 8Manage Corporate Client Business CRM data replaces a paper file as a means of tracking each interaction with a client. When features such as attachments are included in the 8Manage Corporate Client Business CRM system, valuable documents become easily available for review. For example, if a customer is in proposal or contract negotiations, each revision can accompany the customer record for quick review, markup and electronic sharing.
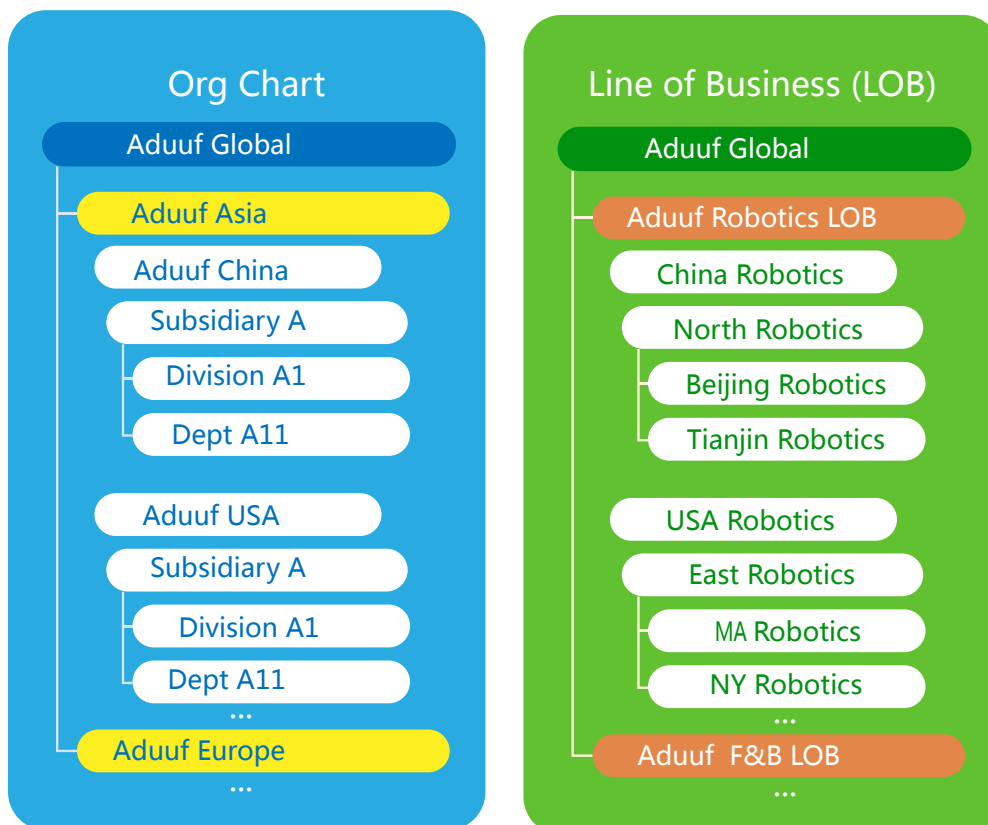
2. Corporate Client's Marketing

8Manage Corporate Client Business CRM captures client's information such as business nature, regions, news and products and its contacts' information such as their job functions, interests and preferences for your team to conduct the different types of marketing activities such as below for the corporate_client:

- Content marketing
- Social media marketing
- 1 on 1 marketing
- eDM

- Relationship marketing
- Event marketing
- eSurvey
- SEM

③. Corporate Client's Business & Organizational Structures

8Manage Corporate Client Business CRM can support corporate clients that are multinational or regional companies. The user is able to create the geographical, line-of-business, subsidiary, organizational and functional structure charts and view the corporate client from the integrated view or the specific views by country, ownership, line-of-business, reporting line and function (e.g., IT).

Org Chart

- Aduuf Global
  - Aduuf Asia
    - Aduuf China
      - Subsidiary A
        - Division A1
          - Dept A11
    - Aduuf USA
      - Subsidiary A
        - Division A1
          - Dept A11
        ...
  - Aduuf Europe
    ...

Line of Business (LOB)

- Aduuf Global
  - Aduuf Robotics LOB
    - China Robotics
      - North Robotics
        - Beijing Robotics
        - Tianjin Robotics
    - USA Robotics
      - East Robotics
        - MA Robotics
        - NY Robotics
        ...
  - Aduuf F&B LOB
    ...

8Manage Corporate Client Business CRM also allows you to organize your marketing, sales, service and support efforts corresponding to the corporate client's business and organizational structures to maximize results.

4. Corporate Client's Financial & Credit Info
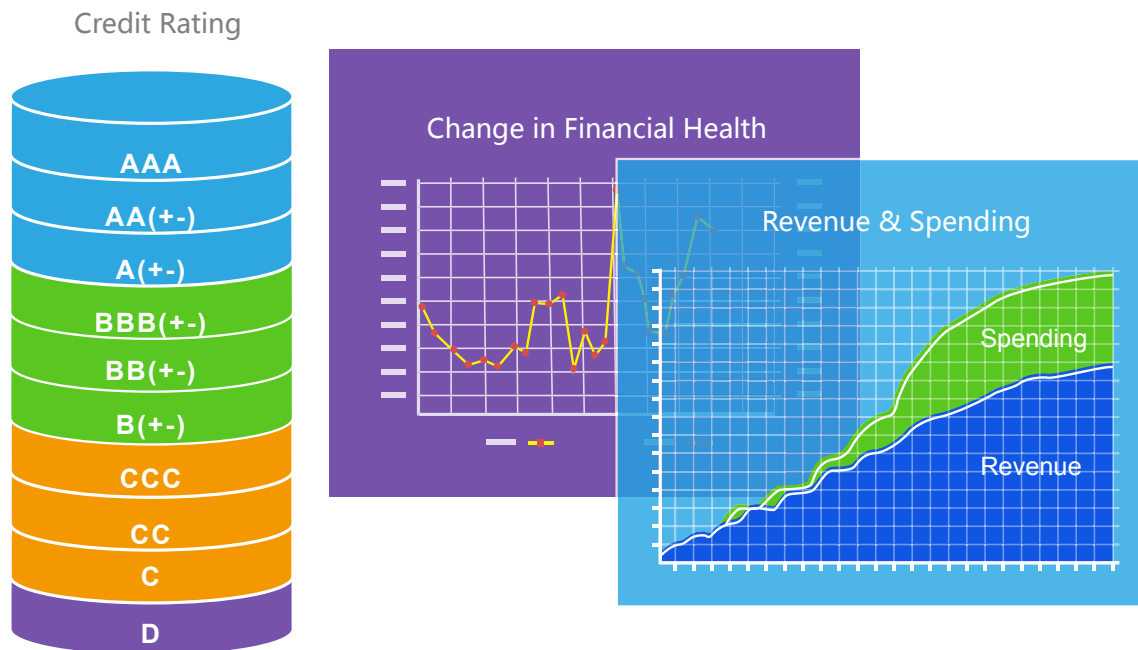
Credit Rating

8Manage Corporate Client Business CRM can record the financial reports, credit ratings and account receivable information of each of your corporate clients. The information would help your team to determine the deposit requirements for the transactions and the appropriate payment collection methods to minimize the collection risk. A client with good financial health is also a higher value client whom your company might need to identify and pursue the longer term relationship.

5. Corporate Client's Interaction & decision Info

8Manage Corporate Client Business CRM allows your team to record all the important events, interactions, actions, decisions and results with your corporate client. Since there is often more than one person in your organization to deal with a corporate client, this would allow your company to maintain corporate memory (not individual memory) with your client.

8Manage Corporate Client Business CRM also records and tracks issues, actions and resolutions to ensure that issues raised by the client will be resolved in a timely and reliable manner.

# ⑥ Corporate Client's Transaction History & Value

8Manage Corporate Client Business CRM can record the following transaction details that you have with your corporate client:

• Product & service item descriptions and prices

• Service level agreement and penalties

• Acceptance criteria and payment terms

• Delivery notes & acceptance document

• Timesheet and expense reports (for time and material base types of transactions)

• Invoices and payments

Corporate client's transaction history also provides the following useful information for conducting future business with the client:

• Client's accustomed products and services

• Client's accustomed contractual terms and conditions

• Client's negotiation tactics and discount requirements

• Client's delivery schedule

• Client's approval process

Client's transaction history can also help your team access the client's value.
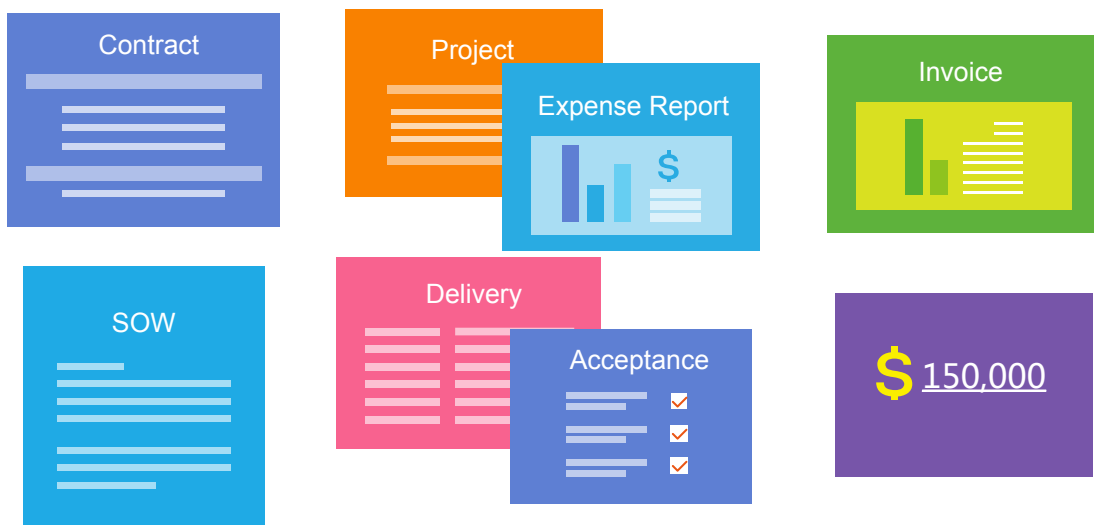
8Manage can provide best combination of standard products & redevelopment services for enterprise management and over 500 corporations in Asia are using our following modules on-premises or SaaS:

8Manage PPM : Project and Portfolio Management

8Manage Timesheet : Resource Time and Cost Management

8Manage SRM : Supplier Management, e-Procurement and e-Tender

8Manage ERP : Enterprise Full Automation

8Manage CRM : Corporate Client CRM and Consumer CRM

8Manage ITSM : Service Management

8Manage HCM : Human Capital Management

8Manage OA : Office Automation

8Manage EDMS : Electronic Document Management System

8Manage Kanban : Visual Agile and Lean