STRATEGIC MODEL

# FLP® CUSTOMER RELATIONSHIP MANAGEMENT

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# FLP® CUSTOMER RELATIONSHIP MANAGEMENT

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|---|---|---|---|---|
| **Service** | Service Planning & Forecasting | Customer Service & Support | Service Operations Management | Professional Services |
| **Marketing** | Marketing Planning | Customer Segmentation | Campaign Management | Lead Management |

# MARKETING

| Marketing Planning | Customer Segmentation | Campaign Management | Lead Management |
|---|---|---|---|
| • Marketing plan Development<br>• Marketing Calendar<br>• Targets/Goals Planning<br>• Budget Planning<br>• Budget Control<br>• Market Opportunity Discovery<br>• Success/Failure Analysis<br>• Co-marketing With Supplier<br>• Marketing Plan for Specific Customer Segments | • Multi-Data Source Access<br>• Define Segments<br>• Individual Customer Base<br>• Customer Behavior Modeling<br>• Customer Profitability Analysis<br>• Top Customer List | • Campaign Planning<br>• Campaign Calendar<br>• Campaign Simulation<br>• Product Allocation<br>• Specific Pricing<br>• Cost/Financial Reporting<br>• Response Analysis<br>• Public/Individual Promotion ways<br>• Campaign Partnership<br>• Success/Failure Analysis | • Automatic Qualification<br>• Lead Dispatching<br>• External List Management<br>• Lead Source Analysis |

# MARKETING PLANNING

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|---|---|
| Marketing plan development | **Forecast of yearly marketing activities**<br>Simple work done already |
| Marketing calendar | **Schedule of marketing activities**<br>Simple work done already |
| Targets/goals planning | **Number of sales lead generated**<br>28 qualified leads/month; 56 general leads/month |
| Budget planning and control | **Use and control of marketing budget of each Q**<br>HK$100,000/Q => HK$1,190 for 1 qualified lead and 2 general leads<br>HK$200,000 extra whole year marketing fund<br>Marketing Fund from supplier |
| Market opportunity discovery | **Find out the chance to get new sales lead**<br>Co-organized seminars with partners, e.g. Cisco, New World, New T&T<br>Co-operation with service conferencing and interior design company |
| Success/Failure Analysis | **Evaluate the effectiveness of marketing activities**<br>Monitor by UAT Customer Manager – Project: [Progress], [Win], [Loss], [Hold]<br>Many failure projects are not reported now, need to develop new mechanism |
| Co-marketing with supplier | **Discuss with supplier for the chance of co-marketing activities**<br>With suppliers such as TANDBERG, Canon, NEC, Sharp, Pioneer and Kirk etc. |
| Marketing plan for specific customer segments | **Specific marketing activities for different customer segments**<br>e.g. Direct Mail to Legal Market |

# CUSTOMER SEGMENTATION

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| **Multi-data source access** | **Access new customer database in different ways**<br>e.g. Exhibition exhibitor list, Member list of different Chambers<br>Database supported by UAT Account Leads – Accounts: [Account], [Contact] |
| **Define segments** | **Define different customer segments**<br>e.g. Geographic location, Business type<br>Supported by UAT Customer Manager – UAT Customers: [Basic => *Customer Type, *Business Type, *Grading, *Source, *District, *Building] |
| **Individual customer base** | **Detailed database of each customer**<br>Supported by UAT Customer Manager – UAT Customers: [Basic], [Contact]<br>Problem: How to keep track on the information update ? |
| **Customer behavior modeling** | **Find out the needs and suitable solutions of different customers**<br>Supported by UAT Customer Manager – UAT Customers: [Journal Entry], [Notes], [Conversation], [Meeting], [Daily Quotation], [Confirmed Quotation] |
| **Customer profitability analysis** | **Analysis the sales volume/ profit generated by each account**<br>Not yet developed, can be done by creating [sales volume] column in UAT Customer Manager |
| **Top customer list** | **Find out the key account which generate most profits for UAT**<br>Can be checked by [Sales Volume] in UAT Customer Manager once it has been created |

# CAMPAGIN MANAGEMENT

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| Campaign planning | **Forecast of yearly special programs**<br>Simple work done already, still need to discuss with different partners |
| Campaign Calendar | **Schedule of special programs**<br>Simple work done already, still need to discuss with different partners |
| Campaign Simulation | **Demonstration and rehearsal before campaigns**<br>Should be done before each campaign |
| Product allocation | **Selection of products displayed and demonstrated in each campaign**<br>Decided before each campaign |
| Specific pricing | **Decide promotional pricing for specific campaigns**<br>Bundle offering/Discount for certain period |
| Cost/financial reporting | **Estimate and evaluate the cost for each campaign**<br>Related to budget planning and control |
| Response analysis | **Keep track on the response for each campaign**<br>Not yet done; need to develop, e.g. questionnaire |
| Public/individual promotion ways | **Promotion ways for different campaigns, e.g. invitation, mass email**<br>Should be done before each campaigns, e.g. print ad, mass email, invitation cards etc. |
| Campaign Partnership | **Co-organize campaigns with large firms, e.g Cisco, New World, Tangberg**<br>Should be start to discuss after Lunar new year |
| Success/failure analysis | **Evaluate the effectiveness of each campaign**<br>Measured by no. of attendees, leads generated and closing deal, to see if they meet targets set |

# LEAD MANAGEMENT

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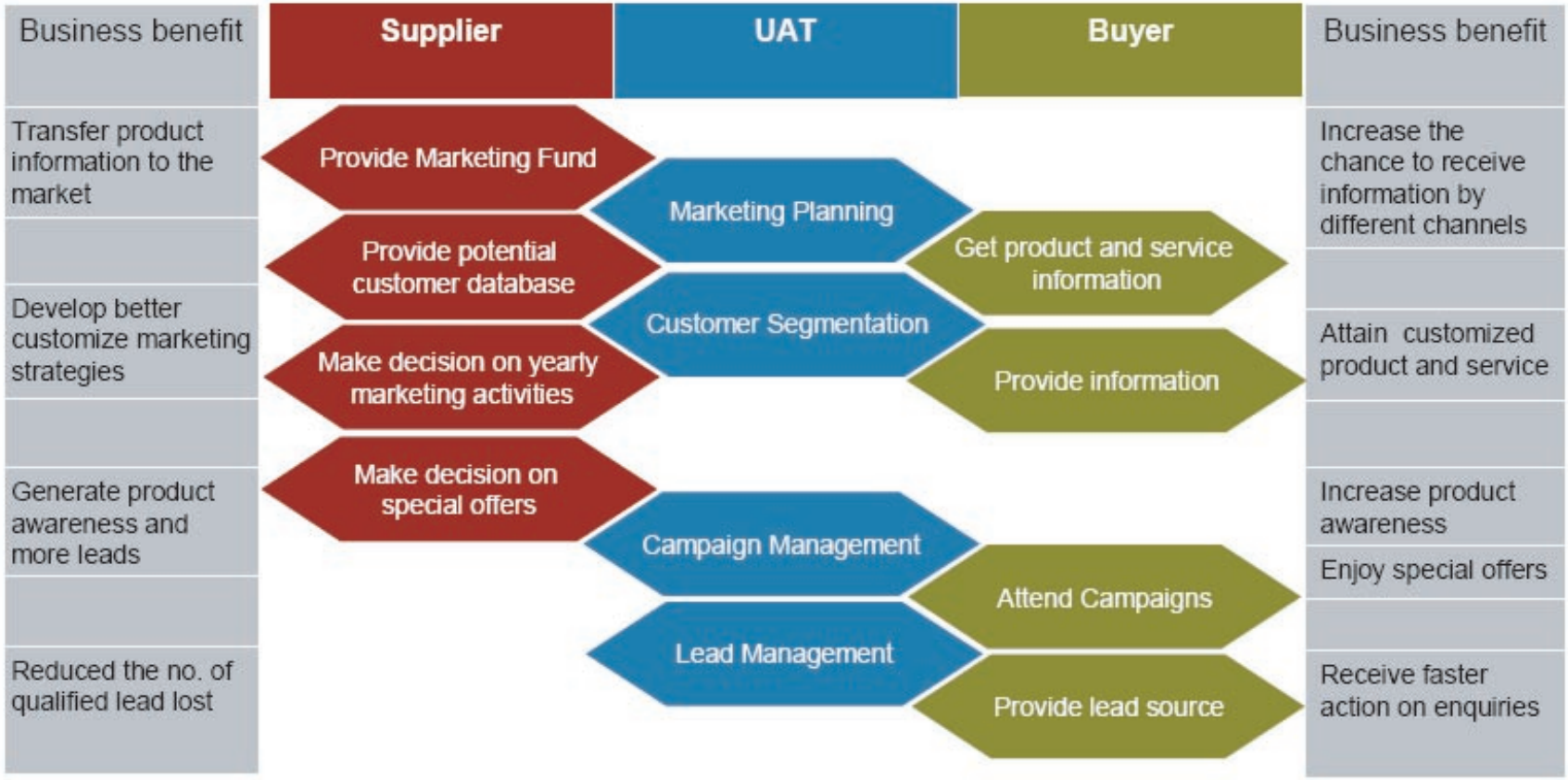
| **Automatic Qualification** | **Evaluation the qualification of leads by asking simple questions**<br>Can be done by preparing questionnaire/script (can take Tandberg form as reference) |
| **Lead Dispatching** | **Immediate handling and follow up of each lead**<br>Discuss with sales manager about the flow of lead and try to create system to record down every enquiries |
| **Lead Source Analysis** | **Analysis the source of qualified leads**<br>Supported by UAT Customer Manager – UAT Customers: [Basic => *source] |

# MARKETING


Business benefit
Supplier
UAT
Buyer
Business benefit
Transfer product information to the market
Provide Marketing Fund
Marketing Planning
Increase the chance to receive information by different channels
Provide potential customer database
Get product and service information
Develop better customize marketing strategies
Customer Segmentation
Make decision on yearly marketing activities
Provide information
Attain customized product and service
Make decision on special offers
Generate product awareness and more leads
Campaign Management
Increase product awareness
Enjoy special offers
Attend Campaigns
Lead Management
Reduced the no. of qualified lead lost
Provide lead source
Receive faster action on enquiries