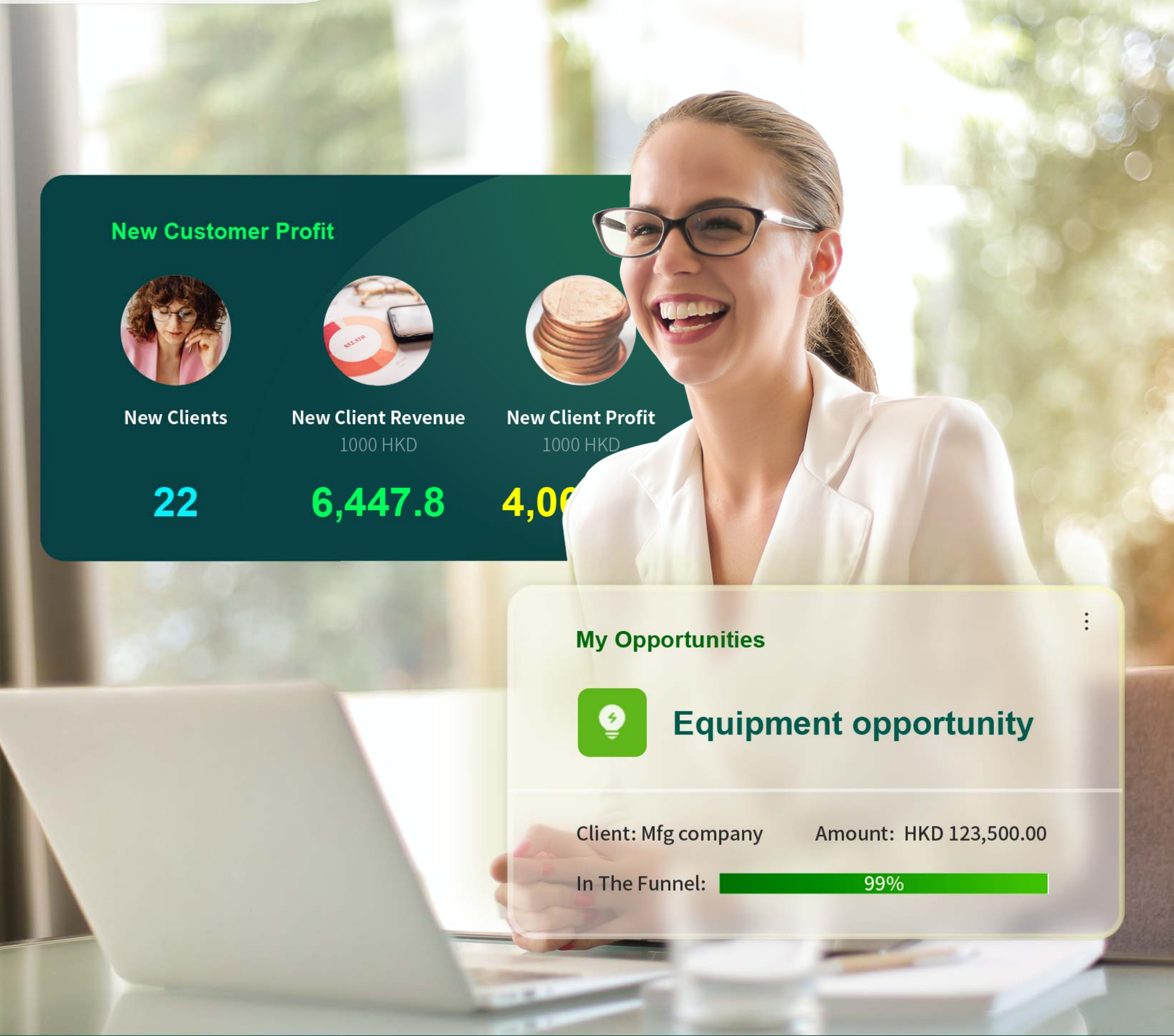


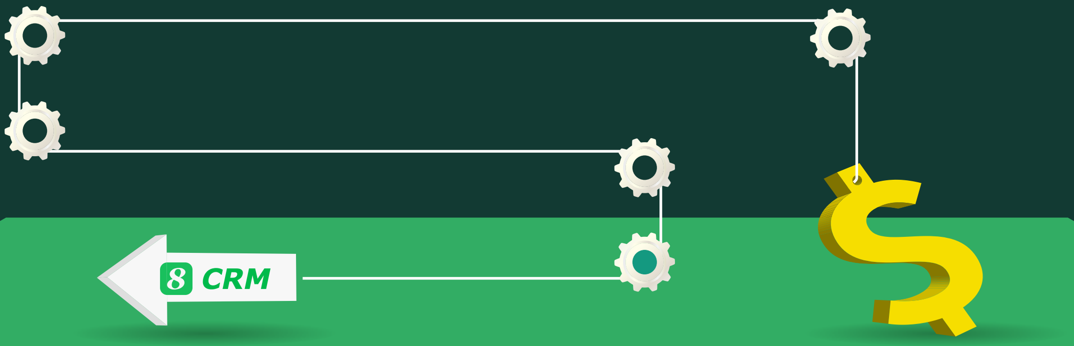
Corporate Client CRM

provides marketing and sales automations and business analytics for you to win.

Wisage Technology Ltd.

Business Elevation

helps advance factors that affect your business prosperity

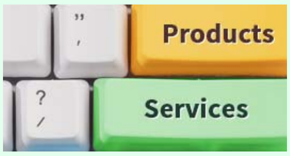


Marketing

- Repository for target audience and automated tools for content creation
- Efficient delivery of personalized contents to segmented audience
- Accurate tracking of the progress and results of each campaign
- Effective marketing cost mgt. and real-time statistics of ROI

Sales

- Find customers and their contact information
- Find contracts and their performance information
- Manage and track leads and opportunities
- Manage client appointments, events and tasks
- Prepare quotations and make sales forecasts
- Prepare customer communication and sales performance reports



Product

- Develop the right products for your markets and ensuring they are presented in a way that captures audience attention
- Ensure product & service performance meets customer expectation
- Enhance products & services can drive incremental sales and customer satisfaction

Service

- Help better understand the needs and concerns of customers and be more precise and deliberately improve services to them.
- Help enhance customer satisfaction, and to gather feedback from customers, analyzing and evaluating the responses to create customer satisfaction initiatives.
- Increased customer loyalty; result in increased revenue in terms of your services.

Executive

- Know where the business sits in the industry and have clarity in your mind that the business needs to improve.
- Help make better decisions by providing data-driven insights into customer needs, competitor strategies and market trends.
- Boost productivity, cut costs, find new opportunities, and reduce risks by optimizing business strategies and making more informed decisions.

1 Marketing Automation

Using 8 CRM, you are fully equipped to design, schedule, execute and track the performance of the planned campaigns in terms of actual return on investment (ROI).

In implementing email campaigns, unlike outsourcing to an email marketing service, you do not expose your confidential customer list to outside parties; you can stage multiple emails in a multi-touch sequence at practically no incremental cost.

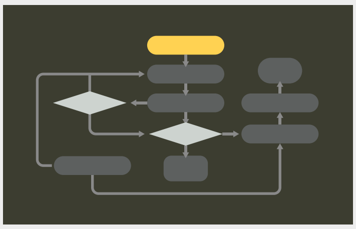
With 8 embedded BI technology driving the email campaign engine, you can selectively seek out a specific group of clients or prospects having common requirements and interest, and to deliver a well prepared personalized message that will appeal strongly to the target audiences.

2 Sales Automation

As sales team members, you can count on 8 to help you look-up client and contact profile and performance information, manage and track sales leads and opportunities, manage client appointments, activities and tasks, prepare quotations as well as prepare client interaction reports, sales performance reports and forecasts.

As sales managers and executives, your business objectives are to guide the delivery of the planned revenue, profit and cash-flow on target and on-time and to grow the sales teams in skills, expertise and performance. 8 CRM provides a holistic view of your business as a whole with links that you can drill down to any level of detail for sales opportunity reports, and Sales performance reports by territory and by sales persons.

Workflow Mgt.

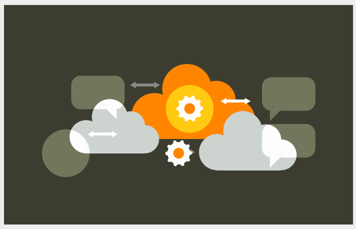


Automate repetitive tasks by allowing your teams to create workflows that trigger actions or send follow-up reminders for the next actions.

Document Mgt.

Collect, upload, store and share documents in a centralized location, making it easier for everyone involved to access information.

Lead Nurturing



Help your teams manage the process of converting leads to customers by developing relationships with prospects and creating targeted contents in each stage of the buyer's journey.

3 Recurring Revenue Mgt.

8 can help you build up recurring business practices so that you can develop trust and loyalty with your customers. They stick around because your product and service are worth paying for, which reduces customer churn and boosts your profits. You can identify the best areas of growth.

Contract Mgt.

Provide tools with best practices for contract drafting and clause negotiation, performance analysis to maximize operational and financial performance and risk mitigation.

Delivery & Support

Provide tools with best practices to manage and measure the swiftness of deliveries and conditions of delivered goods and services and the customer satisfaction level.

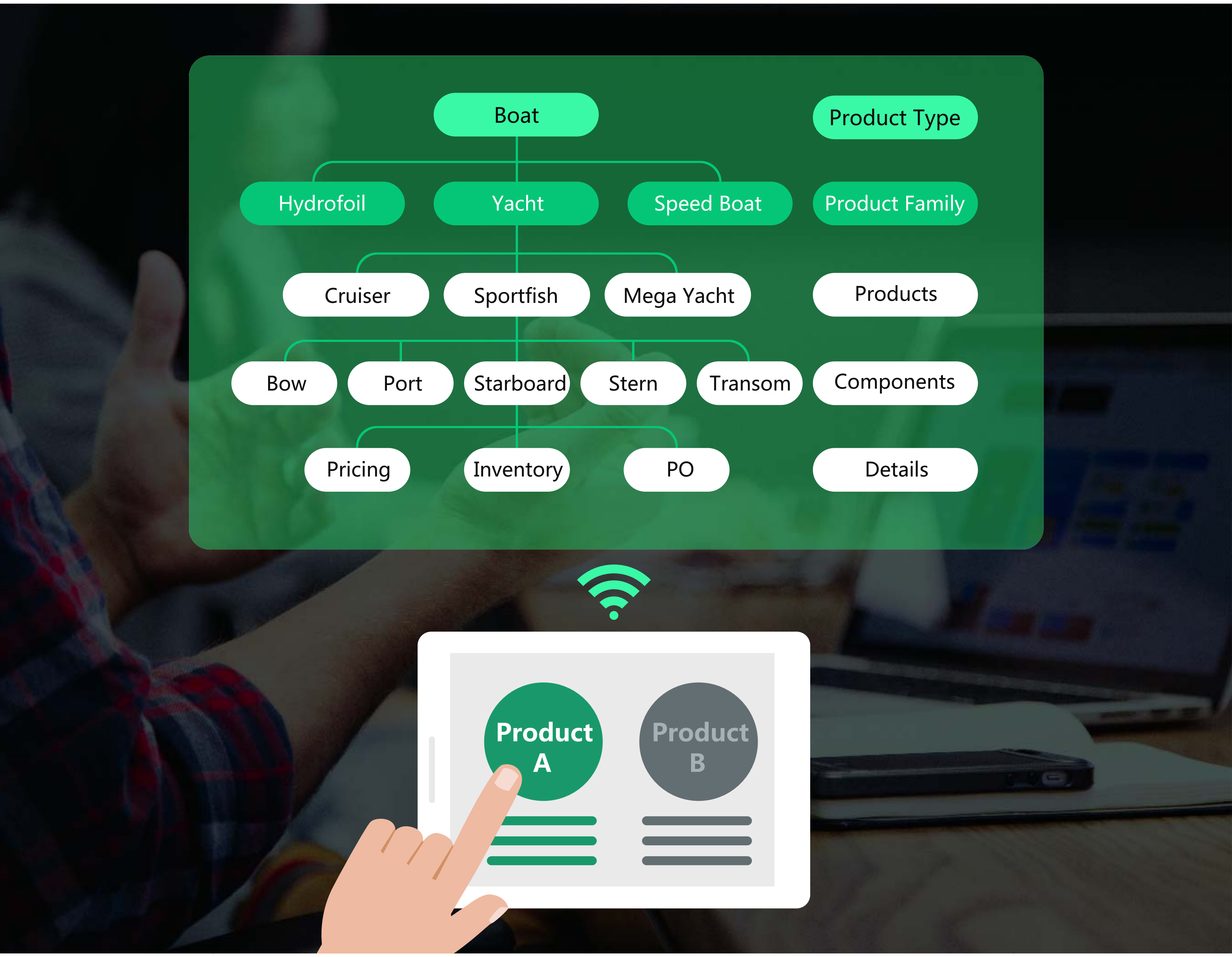
Client Mgt.

Provide tools with best practices to manage and measure communication progress of each client and detect any changes that may impact the client.

4 Product Management

8 CRM provides the following for you to manage your products:

- Product Master to allow you to define product types and subtypes, families, attributes and prices
- Product Component to allow you to define product structure, components, bundle and costs
- Cross-sell and Up-sell to allow you to define relationships with other products and services
- Pick-Pack-Ship to allow you to define the lead time, storage, inventory, packaging and transportation info

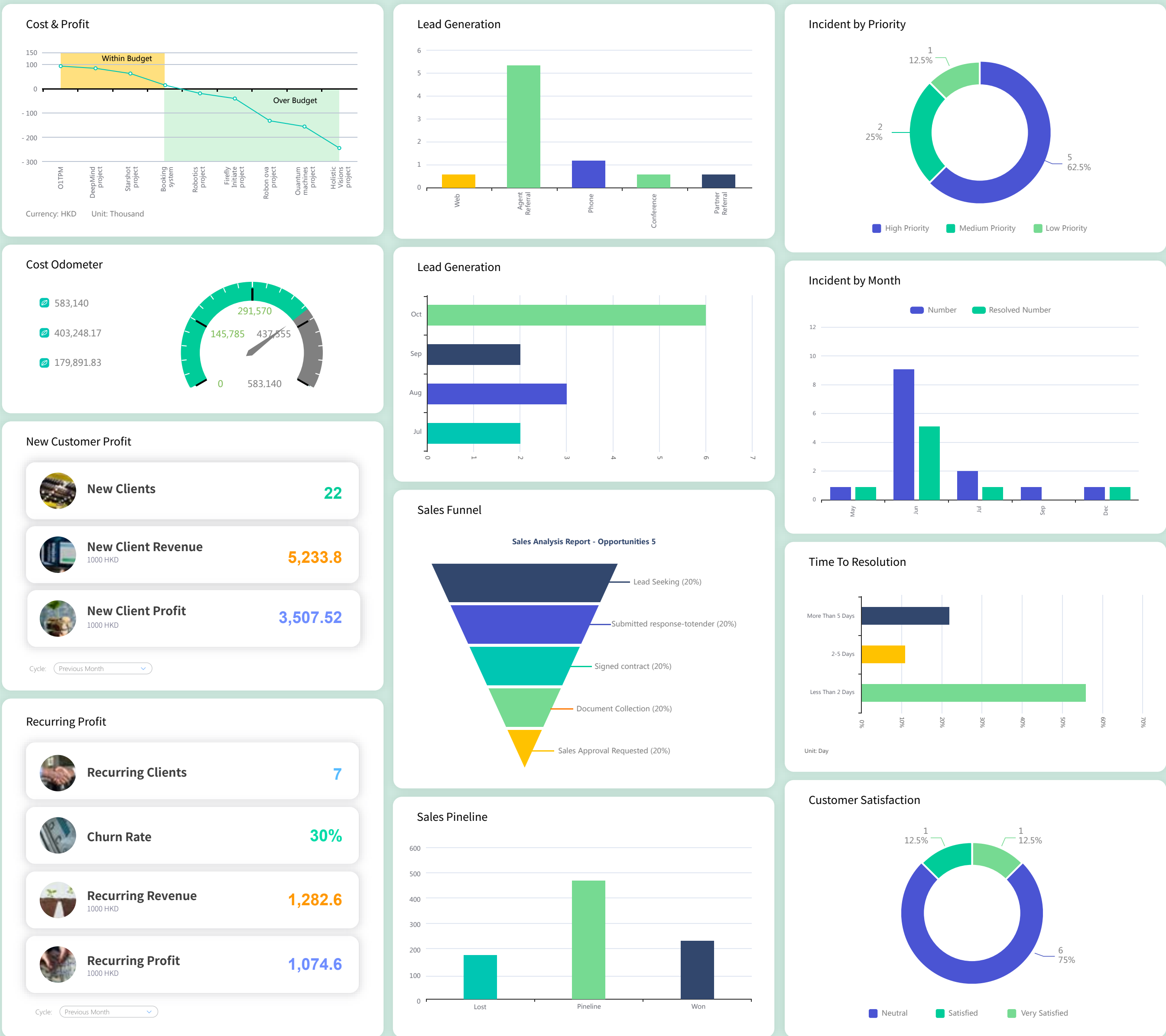


The Product module in 8 CRM is the heart of CRM in the sense that it links to all client orders, returns and satisfactions/complaints associated with products. It is also the backbone for client, business and operation big data analysis.

5 Business Analytics

allows executives to:

- Conduct trend analysis and forecasting, which provide valuable insights into market dynamics, customer behavior and business performance and to improve strategic planning
- Assess product fit, measure to manage better, identify patterns, collect customer feedback, see the bigger picture and to make better decisions
- Analyze data related to operations and processes to identify improvement opportunities. This may include streamlining processes, reducing costs, and increasing efficiency
- More observant with competitor analysis. customer feedback and external factors data and more proactive to look at other industries and similar companies overseas
- Identify potential risks through historical and real-time data analysis, providing early warnings and enabling timely intervention



Feature List

Feature	Description
Client Mgmt	
Client Info	Allow the user to click the org chart for the corporate client to drill down to see the parent and its sub-organization info.
	Allow to group different clients together with a user-defined brand name.
	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 opportunities and progresses of the client.
	Allow to log all interaction and transaction info of the client.
	Allow to log all service 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	Client is also a supplier: Allow a client is also a supplier and/or partner and two-way transaction information will be recorded in the related but separate pages. Client's clients: Allow to identify and record the info of client's clients. Allow to identify and record the info of client's related entities (e.g. subsidiary or parent company).
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 - Contract - Order - Invoice - Payment - Service Ticket 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 - # of sales opportunities - 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
Opportunity Mgmt	Allow the user to enter the following opportunity info: a) Name and ID b) Description c) Responsible parties d) Client info e) Investment and return f) Schedule g) Priority
	Allow user-define fields for info recording, search and listing.
	Support competition, value proposition, influencer and leverage analysis.
	Support cost budgeting and tracking.
	Support info sharing for team selling.
	Support ROI analysis, competition analysis, automatic GP and GP rate calculation.
	Support management review for prioritization.
	Allow user-defined approval flow.
	Support action plan and assignment tracking.
	Support response to tender management.
	Support real-time progress tracking.
	Provide the following real-time reports: a) Investment attention b) Cost & return c) Expected vs. actual d) Funnel analysis e) Status summaries
	Provide project mgmt as add-on to allow sales project mgmt for large or complex opportunities.
	Support generation of sales order or contract from a successful opportunity.

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 contract or 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.
Contract Mgmt for Sophisticated Products	Provide contract management for consumer products: a) Creation of contracts based on fixed price or time & materials b) Metrics-based authorization and allow user-defined quotation approval flow based on department/team c) Provide sophisticated Bill of Material function in contract, such as version definition and comparison, approval flow/stages settings and link with inventory, etc. d) Allow contract payment to be triggered by time or completion of project milestones e) Support contract renewal or provide contract renewal reminder for manual renewal
	Support Service Level Agreement management in contract: a) User-defined measurement types b) Definition of target type, reward type and buffer type and penalty type c) Link with project milestones/user-defined milestones for SLA measures d) Calculation and monitoring of actual result and gap between target and result e) Track SLA target & result on one screen
	Support user-defined contract template and export to Excel or PDF in a user-defined format
	Support change approval before allowing to change the contents of an approved contract.
	Support version control in contract.
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/contracts.
	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/contract.
	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/contract c) Batching handling of payment received from client to settle multiple invoices of a client for different orders/contracts 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, contract 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.

8 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:

- **8 CRM** : Corporate Client CRM and Consumer CRM
- **8 Service** : Service Management
- **8 SRM** : Supplier Management, e-Procurement and e-Tender
- **8 PPM** : Project and Portfolio Management
- **8 New Way** : Visual Agile and Lean
- **8 Timesheet** : Resource Time and Cost Management
- **8 EDMS** : Electronic Document Management System
- **8 OA** : Office Automation
- **8 HCM** : Human Capital Management
- **8 All-in-one** : Enterprise Full Automation

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