

Aoba Loyalty CRM



Member Features

Customer Profile
Sales Team Automation
Transaction Integration
Products and Warranty
Service Followup
Alerts and Workflow
Analysis and Reporting
Mobile / Social CRM



Portal

eForm Apply
Transaction Inquiry
Help Desk Requests



Call Centre

Inbound / Outbound Calls
Call Schedule / Scripts
Call History / Recording



Aoba Loyalty CRM



POWERED BY
SUGARCRM

Enable the Customer Journey with your Loyalty CRM platform

With the increasing competition from the market, building loyalty from existing customers is the proven and the most effective method to maintain a solid customer base for business growth. Successful businesses use a CRM system that enables the Customer Journey. It includes strong customer profiling, activity and transaction tracking, bonus points and rewards, service management, as well as marketing and promotion tools.

Our Solution

The Aoba Loyalty CRM is a one stop shop solution built on top of the **SugarCRM** (www.sugarcrm.com) platform. With the different Aoba enhancement components, it provides an integrated environment to manage your entire customer loyalty operations.

- Keeps detailed consolidated customer information with customized profile and activities history;
- Integrate sales and other transactions from different systems into CRM.
- Use customized rules by VIP level and rofile, by product and promotion event, to calculate bonus points and rewards.
- Integrate with various Point of Sales systems and devices for gift item and coupon redemptions.
- Maintain tight control on all bonus point activities. Track and manage bonus points granted, redeemed or adjusted with full audit trail.
- Provide member touch points for self

service by Members including Web Portal, Mobile App and Onsite Devices. Provide push promotions as appropriate to member preferences.

- Targeted marketing activities. Support eDM, SMS, print. Can include coupon offers with campaigns. Campaign effectiveness analysis and tracking.
- Audit trail and tracking of all bonus points and coupons to the source transaction, the reward scheme used. Cost analysis of coupons issued and ability to share costs with partner merchants.
- Provide quality service levels with help desk requests. Ability to integrate with custom feedback surveys.

CRM Base Functions

1. Customer Management

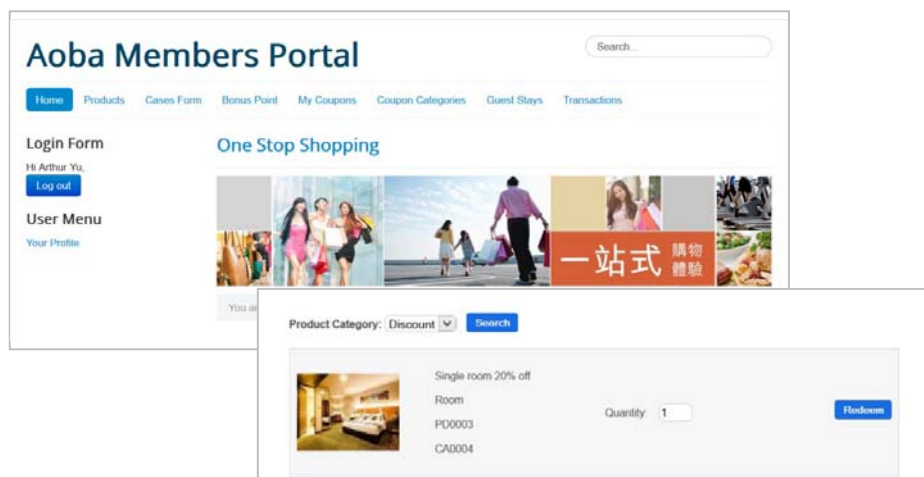
Maintain detail profiles of your customer accounts and contacts. Categorize them with custom profile fields. Track all activities including calls, meetings, tasks and Email correspondence. Add notes and attach relevant documents.

2. Marketing and Lead Generation

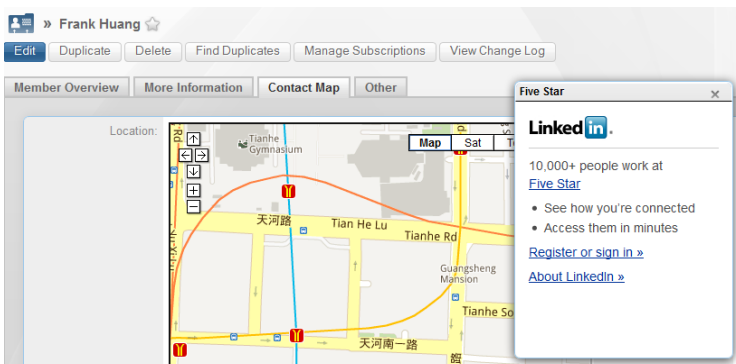
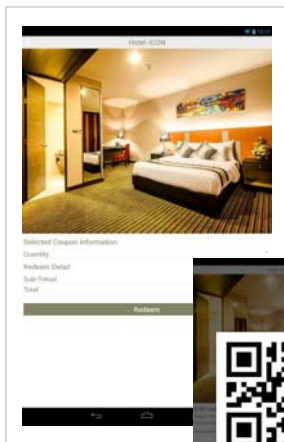
Prepare target marketing campaigns with measurement of campaign effectiveness. Select responses and assign for follow up by call center or sales team. Marketing messages and newsletters through eDM Email, or print with Word plug-in.

3. Sales Force Automation

Manage your different sales teams. Monitor opportunities and sales targets. Analyze sales pipelines and funnel projections.



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4. Service and Support

Centrally manage all support requests. Assign to team members for followup action. Use alerts to generate automated followup actions. Allow dynamic creation of support teams.

5. Alerts Workflow

Monitor all records in the system. Issues alerts and warnings for overdue tasks. Use alerts to pro-actively generate tasks for followup action.

6. Analysis and Reporting

User driven reporting that allows listing, summary, charts and matrix reporting. Add reports and graphs to your dashboard with Sugar Reports.

7. Sugar Mobile

All CRM modules are mobile enabled with native Sugar Mobile app for IOS or Android. CRM includes tools for customization of mobile web forms.

2. Social Integration

SugarCRM solutions are social enabled, be it Facebook, LinkedIn, or others. The Social Connector allows easy plugin of integration components.



Activities		
Create Action Plan / Task	Schedule Meeting	Log Call
Compose Email		
Close	Subject	Status
Close	Review maintenance	Planned
History		
Create Note or Attachment	Action Email	View Summary
Subject		Status
Scanning RFP - HKTC		Completed
Data integration RFP - HKTC		Completed
RFP ready when - HKTC		Hold

3. Document Integration

Aoba DMS is a full function document processing and management platform. CRM can be fully integrated with Aoba DMS for direct upload.

4. Workflow Integration

Sugar Enterprise now includes a full graphical workflow engine, integrated right inside the application. Aoba custom workflow enhancement can also extend the workflow to you agents, partners and suppliers.

Loyalty and Membership

1. Membership tracking

Track different aspects of their membership including membership level, member card and renewals; interest groups and chapters.

2. Reward Plans

Flexibly define your bonus point plans. These include by VIP level, by member birthday, by product, product category, by promotion period. Setup your promotions with bonus points or gift items.

3. Gift Item and Coupons

Members can easily convert their bonus points to gift items in the gift catalog. Coupons are



then issued with QR code to their members account for redemption at the participating outlets. Coupons may also be issued on joining, on birthday and special promotions.

4. Event and Attendance

Events management, member invitations and tracking of member attendance.

5. Promotion Analysis

Performance analysis of promotions, invitations, coupons issued and result sales transactions.

6. Members Web Portal

The Members Web Portal allows self service by members and is fully integrated with CRM. It allows profile update, bonus point conversion, coupon download and others.

7. Members Mobile App

A mobile app is also available for members to install on their IOS or Android based mobile device.

8. Mobile Ordering

Our optional mobile ordering module allows actual placing of order transactions as in a Point of Sales terminal. The transaction is then sent back to your POS of choice for payment and delivery completion.

Call Center and Telephony

1. IP Phone Integration

SugarCRM has integration with IP telephony systems including Cisco, Avaya, Asterisk and others. This provide click-to-dial functions, call in popup and voice recording.

2. Call Center Help Desk

With call center function, CRM can perform outbound marketing and



with call lists, custom call script and followup sales referral. As a help desk, incoming call will popup to allow one click customer lookup, case ticket issue and followup task assignment.

High Data Security

Your CRM data access can be flexibly setup with the Sugar team security mechanism. Additional user role setup, down to the field level, allow setup of the actions that each user group may perform.

Cloud or On-Premise?

Aoba CRM solutions are cloud enabled and ready to deploy with our Cloud Hosting partners. The systems can also be installed On-Premise with your own servers including IBM X and Power servers. The choice is yours!



Summary:

Aoba Loyalty CRM provides a powerful platform to manage your customers, membership and loyalty schemes. It enables you to improve the entire Customer Journey. It will integrate with your Point of Sales and backoffice systems. With our Logic Engine, even complex bonus point schemes can be easily handled with strong audit trails. The Members Web Portal and Mobile App provides a self service customer touch point. Aoba Loyalty CRM is powered by the SugarCRM platform (www.sugarcrm.com), a proven and widely used system by world class organizations.

About Aoba-Hopkins

Aoba Hopkins Information Management Ltd. is the IT service division of the Aoba Hopkins Group, a well established accounting, audit, tax and business consulting firm in Hong Kong and China. We provide business process improvement services while leveraging IT tools including CRM, Documents, Workflow and Mobile. We will always be ready to assist you in your business challenges!