

# High-Tech CRM Solutions for the New Energy Industry

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Rektec Information Technology Co.,Ltd





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# 1 About Rektec





# Rektec - With the mission of enabling technology to accelerate enterprise growth, it helps Chinese enterprises to digitally transform and grow

#### Advanced technology platform + professional industry solutions + digital products

#### 17+ years

Focus on the digital field of marketing services for more than 10 years

#### 7+ industry solutions

High-tech/New Energy, Industrial Manufacturing, Automobile/Equipment, Home Appliances, Consumer Goods Retail, Medical and Health Care and Modern Service Industries

#### 180+ regions/countries

Assisted Chinese enterprises to successfully implement and deliver Dynamics systems in more than 180 regions or countries around the world, and the overseas cases are far ahead

#### 1000+ consultants and technologies

Professional implementation and service system, the largest team in the CRM field

#### 800+ successful customer cases

It has established cooperation with many industry benchmarking enterprises, and more than 70% of its customers are listed companies

Fortune 500 and China Top 500 companies account for more than 20%.





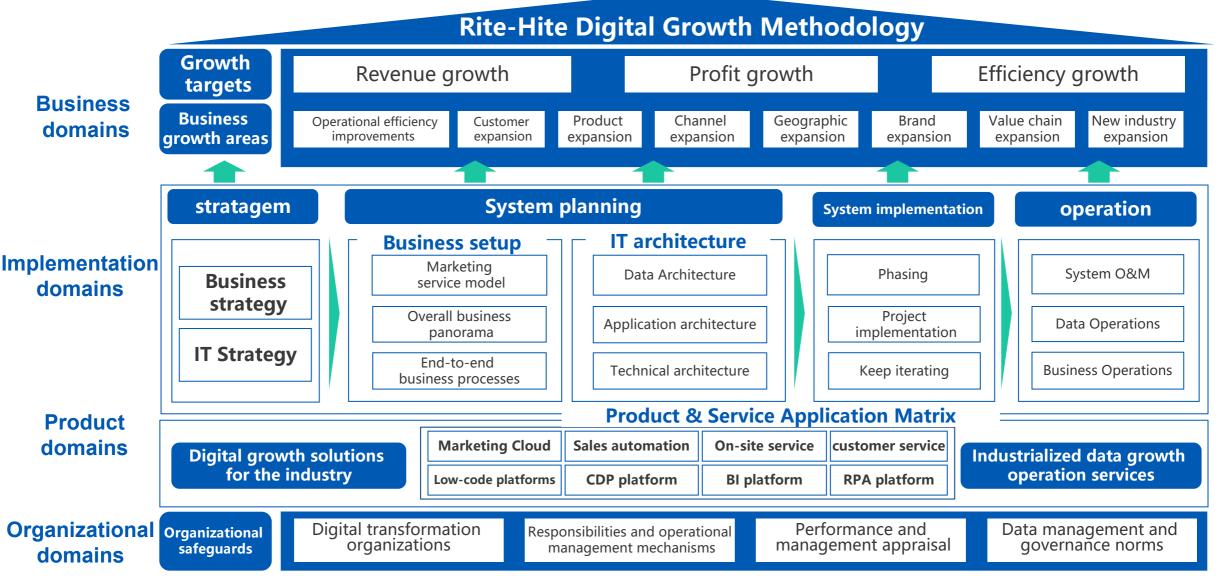
# Help enterprises build a customer-centric, data-driven digital growth system

#### **Connect, Empower - > Experience, Efficiency Customer value Customer acquisition Customer Operations Customer conversions** enhancement Visit the Loyalty website and operations WeChat Product/ **Proactive** Ordering/ event service and care · m @ Delivery recomme Online ndations Research consultation Im products Lead/ /service Customer ₿\$ through Opportunity experience social media Management sharing Complaints/ Sales follow-up Repairs Handling Whole Sell **Customer Attentive** network efficiently **Operations** service marketing channel marketing Value sale serve

### **Data > Insights > Intelligence**



## Rektec Digital Growth Methodology



### Rektec digital growth solutions, product suites, and services

With the help of digital growth methodology, project implementation is carried out based on mature industry solutions and product suites, and continuous value creation for enterprises through operation management to accelerate enterprise growth

#### Rektec-Hite digital growth solutions, product suites, and services Revenue growth Profit growth Efficiency growth Implement delivery **Operational Services** solution Product suite G+ **ONE App** Home appliance and application home furnishing Master Plan System O&M Partner Sales ONE mar ONE Custo High-tech ketin sale Marketing mer Service Home appliance and **Professional** ONE ONE **Data Operations** home furnishing implementation Microsoft D365/Power G+ CRM **Platform** Health services Intelligent cloud platform **Business Operations** Keep iterating R platform **Pharmaceutical** (Data & AI、IOT、RPA) .....

#### **Digital Growth Methodology**



### Microsoft Gold Partner and Best Solution Provider





- · National high-tech enterprise
- National Gazelle Enterprise
- Key software enterprises in the planning and layout of Jiangsu Province
- Suzhou Digital Economy Demonstration Enterprise
- Suzhou "head goose" enterprise

- It has been certified as a Microsoft Gold Partner for many years
- Microsoft Dynamics Cloud Pioneer Partner
- Microsoft Dynamics Best Ecosystem Partner in Greater China
- Microsoft Business Applications Partner of the Year



- ISO27001
- 2023 CEPREI Product Testing
   Certificate
- Highgo Product Compatibility
   Certificate

Based on CRM, mobile and cloud computing technologies, it promotes the innovation and transformation of enterprise marketing management, and is the largest Dynamics 365 CRM service provider in Greater China

- ✓ The only service provider that has been providing Dynamics CRM business services for more than 15 years and has maintained continuous business growth every year, and the number of MCP certified consultants accounts for 1/4 of the Greater China region
- ✓ The only service provider that has served more than 500 listed companies in the field of Dynamics CRM, and more than 1/2 of the CRM cases in Greater China.
- ✓ The only one that has been the best Dynamics ecological partner in Greater China for 5 consecutive years (FY17/FY18/FY19/FY20/FY21);

# 2 High-Tech/New Energy Industry Analysis



# Analysis of marketing characteristics of new energy industry



# New energy industry

- The new energy industry mainly stems from the discovery and application of new energy;
- New energy generally refers to renewable energy developed and utilized based on new technologies, such as solar, geothermal, wind, ocean, biomass, tidal energy, and the thermal cycle between the ocean surface and its depths

#### products

- Products include semi-finished products and finished products;
- Standard products

   customized
   products;

3

#### **Price**

- For semi-finished products, such as silicon wafers, there is a base price;
- For finished products and projects, it is a single negotiation, and each order is priced and verified;



#### channel

- Mainly self-built channel direct sales, there will also be a small number of agent sales;
- Most companies are already doing business globally;

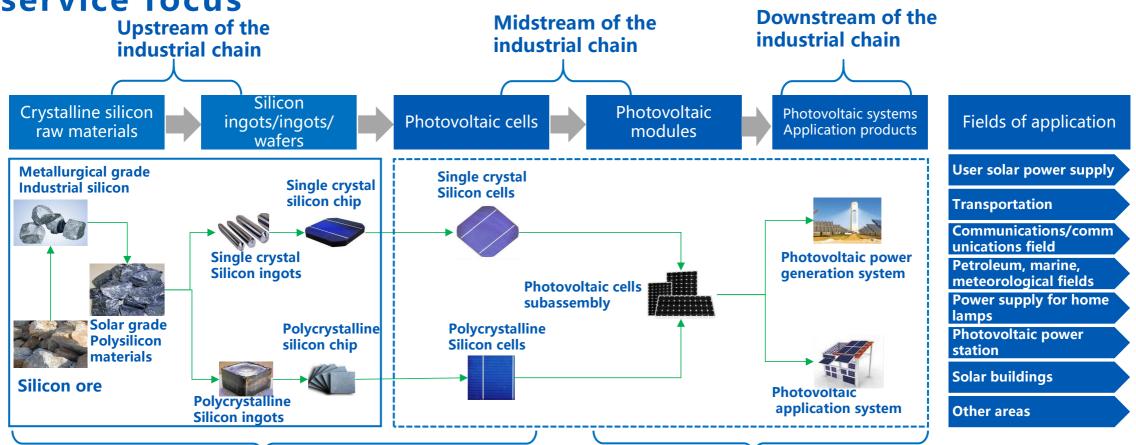


#### sales promotion

- The sales method is mainly direct sales;
- Sales team promotion, marketing activities promotion;
- The customer base is mainly the government, units/organizations, families, etc.;



# Solar photovoltaic industry chain analysis and marketing service focus



- **Products:** The upstream is mainly crystalline silicon raw materials, silicon rods/silicon ingots/silicon wafers; Midstream: photovoltaic cells;
- Sales model: It is a typical B2B direct sales model; Mainly sell to large customers:

Customer demand management

Contract performance management

Customer satisfaction management

Sales team management

- Products: Midstream: Photovoltaic Modules; Downstream: photovoltaic power generation and application system;
- Sales model: project-based sales, direct sales + distribution; General direct sales are B2B, distribution is B2B2C:

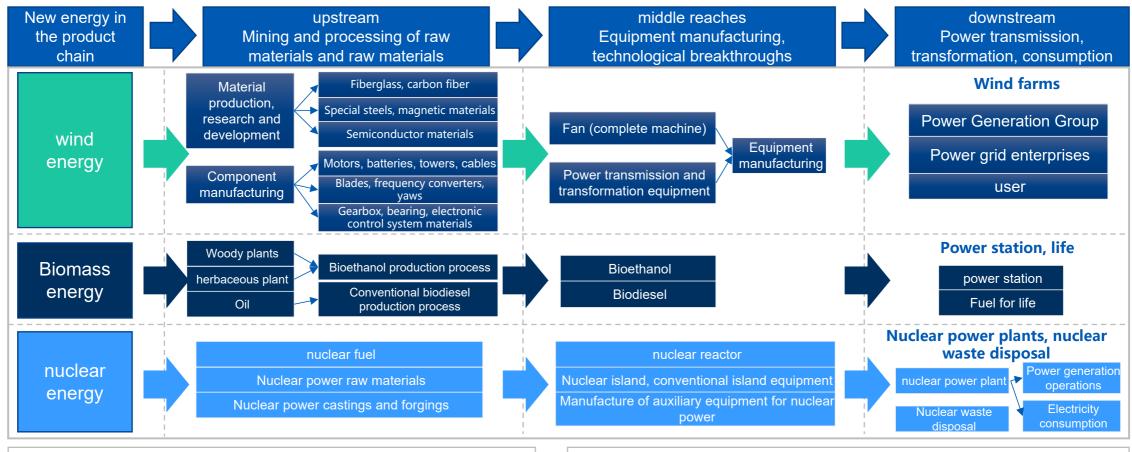
Comprehensive customer information management

Sales process management

Customer service management

Sales team management

# Wind energy, biomass energy, nuclear energy industry chain analysis and marketing service focus



- Products: upstream raw materials, raw material processing and parts;
- Sales model: It is a typical B2B direct sales model; Mainly sell to large customers;

Customer demand management

Contract performance management

Customer satisfaction management

Sales team management

- Products: Midstream: Products + Services;
   Sales model: project based sales P2P direct
- Sales model: project-based sales, B2B direct sales model;

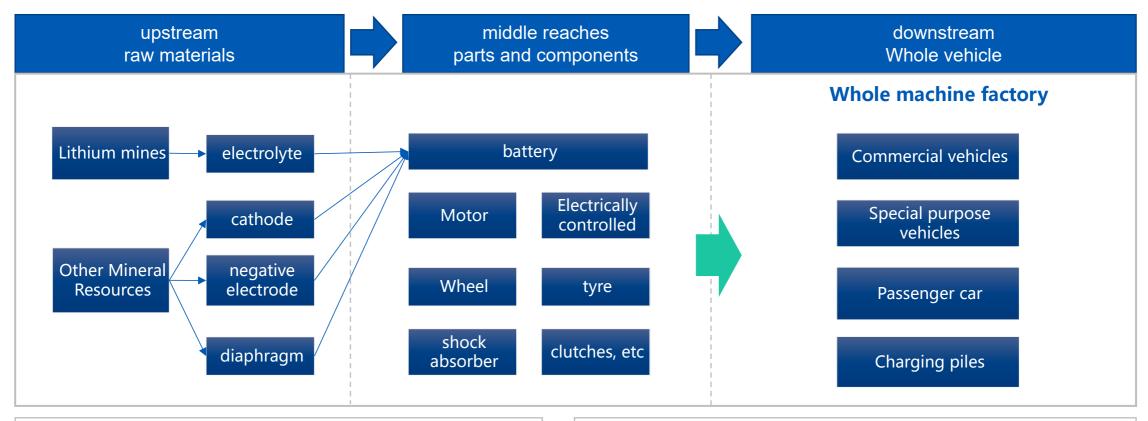
Comprehensive customer information

Sales process management

**Customer service** management

Sales team management

### New energy vehicle industry chain analysis and marketing service focus



- **Products:** upstream electrolytes and other raw materials;
- Sales model: It is a typical B2B direct sales model; Mainly sell to large customers;

Customer demand management

Contract performance management Customer satisfaction management Sales team management Comprehensive customer information

**Sales process** management

based on key customer sales;

Downstream: commercial vehicles, special vehicles;

• **Products:** midstream batteries, motors and other components;

Sales model: project-based sales, B2B direct sales model, mainly

**Customer** 

Sales team management

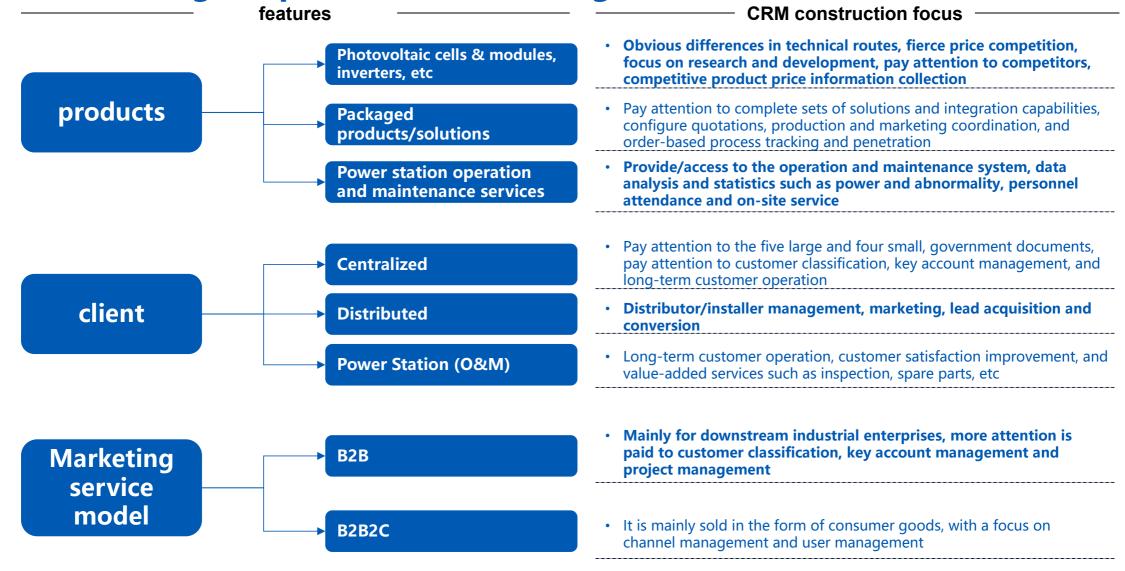
management

service management

3 Digital Marketing and Service Solutions



# Focus on CRM construction under different products, customer groups, and marketing service models





# Decomposition of marketing service capabilities in the new energy industry

**Ability Overall capability planning** breakdown for industry CRM Lead generation and Ability to convert business Contract delivery capability integration capabilities opportunities **Ability to sell** Front-end and back-end Customer risk management EPC project management and follow-up capabilities and control capabilities synergy Channel development Channel operation Ability to meet channel Channel capabilities capabilities demand 2 distribution capabilities Channel business synergy Channel risk management Marketing capabilities capabilities and control capabilities **CRM** Customer satisfaction management Ability to capture customer demands improvement **Boost your After-sales** service capabilities boost Service experience improvement Service quality improvement Market share Customer tiering and Customer marketing and Key account data insights categorization reach **User insights** Lead generation and integration capabilities User journeys Overseas channel Overseas marketing **Expand your** Global delivery capabilities development capabilities capabilities capabilities Ability to meet overseas compliance laws Global IT service & operation and globally and regulations maintenance capabilities



# Key business needs and solution focus of marketing services in the new energy industry

## Management concerns

**Customers:** Establish a unified platform to realize the assetization of customer information, and enhance customer value by customer classification

**Marketing:** Multi-faceted customer contact to enhance customer experience

**Sales process:** LTC pulls through the whole process and establishes a channel management system

**Service management:** Establish a service upgrade system, quickly respond to customer feedback, and provide customers with value-added services

**Decision analysis:** Provides easy-to-use charts and report analysis tools, and can integrate data insight platforms such as BI

#### Key business issues and challenges

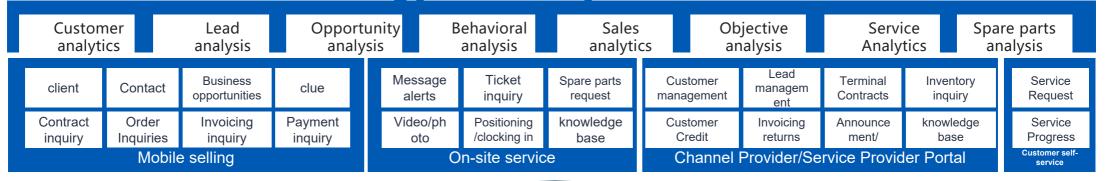
- 1. Customer information is scattered in different personnel and systems, and it is difficult to analyze customer operations and make sales decisions.
- 2. Lack of systematic classification and hierarchical management of customers, lack of targeted marketing and services;
- 1. There is no effective collection channel for market data, and data analysis to guide the market;
- 2. Lack of process control in the planning, execution and write-off of market activities;
- 3. There is a lack of continuous follow-up of the conversion leads of the campaign, and the effect of the campaign is difficult to evaluate.
- 1. The sales behavior is not transparent, and it is not easy to analyze and count, resulting in untimely or inadequate sales guidance;
- 2. Lack of standardized and transparent management of project process follow-up and customer development;
- 3. Lack of LTC full-process and full-data connectivity;
- 4. The channel management is not perfect, and the efficiency of channel business collaboration is low;
- 1. The handling process of customer complaints and major incidents is not timely and transparent
- 2. Lack of targeted customer service and care, and inability to query and analyze historical service conditions;
- 3. Lack of integration with call centers and discontinuous information;
- 1. There is a lack of a platform that integrates customer-related information (customers, opportunities, sales activities, demand planning, order processing, payment collections, complaints, etc.) for multi-dimensional analysis to support marketing decisions

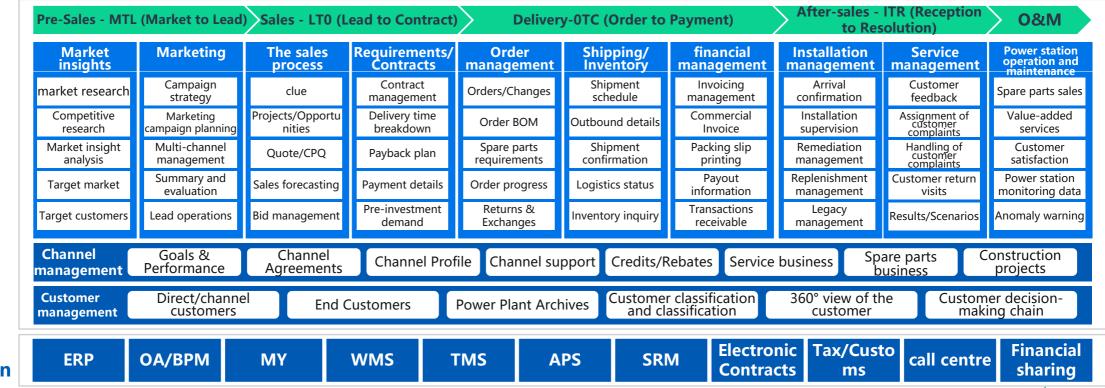


The overall functional architecture of digital marketing services in the new energy industry

Data Insights

**Business** front desk





**Business** 

Middle

Office

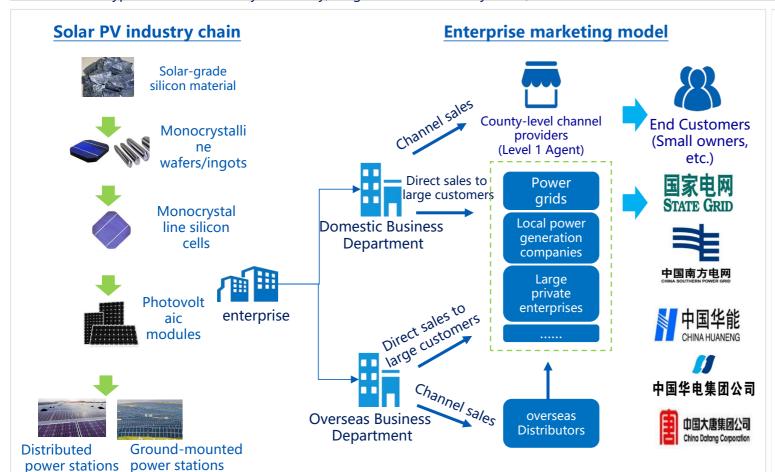
**System** integration

4 CRM Implementation Case Sharing



# Customer case 1: A photovoltaic company empowers its sales team with Dynamics CRM to improve sales operation efficiency

- As a leading brand in the global photovoltaic industry, the company's product line covers the application of the whole solar photovoltaic industry chain; As the middle of the industrial chain, photovoltaic modules focus on the R&D, production and sales of solar cell modules, and the sales model is divided into project-based delivery directly facing large customers, channel dealer distribution, and scattered customer sales;
- Project-based delivery is characterized by a long sales cycle, a large customer scale, and the customer generally has a corresponding decision-making chain; The channel distribution type is characterized by continuity, long duration and many times; Scattered customer sales are characterized by small, multiple, and fast.



#### <u>challenge</u>

The project-based sales cycle is long, lacks project process management, and cannot understand the customer relationship on the project (EPC, developer, owner, design institute, etc.); The number of channel distribution orders is relatively large, and the delivery is fast, and the whole sales process is disjointed; Customer complaint information is not closed, and it is difficult to trace the information, which affects customer satisfaction.

#### scheme

- Centralized management of customer resources: build a unified customer management platform, integrate peripheral systems, build a 360-degree view of customers, and carry out differentiated management of customer classification;
- Standardized business opportunity process management:
   Leads and business opportunities are connected to achieve
   lead-opportunity-contract traceability, and at the same time,
   the standardized business opportunity follow-up stage can
   be viewed and coached to improve the transformation of
   business opportunities;
- LTC end-to-end process integration: The whole process of leads, business opportunities, contracts, orders, delivery, invoicing, and payment collection is connected, so as to visualize the progress of contract order execution and improve the efficiency of sales business operations.
- Product traceability management: unify the customer complaint entry port, and integrate with OA, MES, ERP systems, through serial code to trace delivery, order, contract information, improve product traceability efficiency;



# Customer case 2: XX Group - multiple subsidiaries use the D365 platform to build domestic/overseas, sales/service full-process business

Founded in 1984, XX Group Co., Ltd. is a world-renowned provider of smart energy system solutions. The company focuses on the implementation of the strategic measures of "industrialization, technology, internationalization, digitalization, and platformization", and has formed three major sectors of "green energy, intelligent electrical, and smart low-carbon" and two platforms of "XX International and Science and Technology Incubation", with business in more than 140 countries and regions, more than 50,000 employees worldwide, and an annual sales revenue of 178 billion yuan in 2024, which has been on the list of the top 500 Chinese enterprises for more than 20 consecutive years.

# Manufacturer of distributed components

### Domestic service project implementation content:

- Unified customer service workbench: integrate
  the call center, quickly identify customers on the
  pop-up screen of incoming calls, and realize
  closed-loop management of acceptance, dispatch,
  monitoring, and return visits;
- Whole-process service tracking: Through the implementation of important nodes in the service process and mobile on-site services, efficient collaboration and information transparency with service providers and service workers are realized to improve service efficiency;
- Refined management of accessories: closed-loop traceability of accessories application, review and issuance to improve the refinement of accessories management.

# Inverter, energy storage, smart photovoltaic cloud solution provider

### Overseas after-sales service items:

- Germany, Spain, Portugal, Italy, Poland, Brazil, Turkey and other countries
- Omnichannel builds a unified customer service workbench and integrates multichannel customer acceptance portals
- Standardized management of service, spare parts, service support, old parts and other processes

# Overseas sales and service of low-voltage electrical, inverter, solar energy, high-voltage electrical, etc

### Overseas sales promotion projects:

- Outreach efforts in the Czech Republic, Poland and Romania
- Customer resource management, realize the integration of international customer resources, and present customers from a 360-degree perspective
- Build a closed loop of MTC process to visualize leads, business opportunities, contracts and order execution processes
- Docking with ERP to achieve business data integration





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