

High-Tech CRM Solutions for the New Energy Industry

2025/04

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

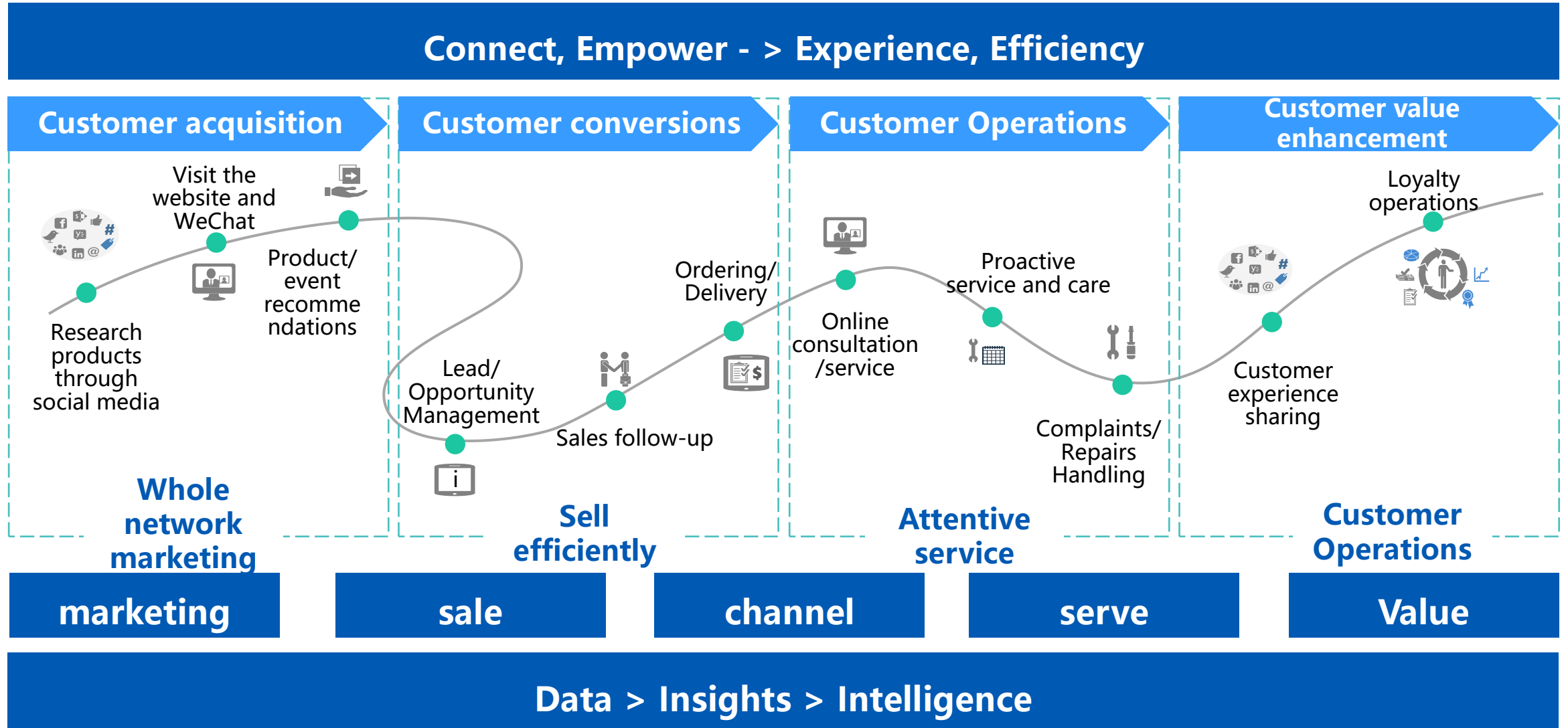
800+ successful customer cases

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

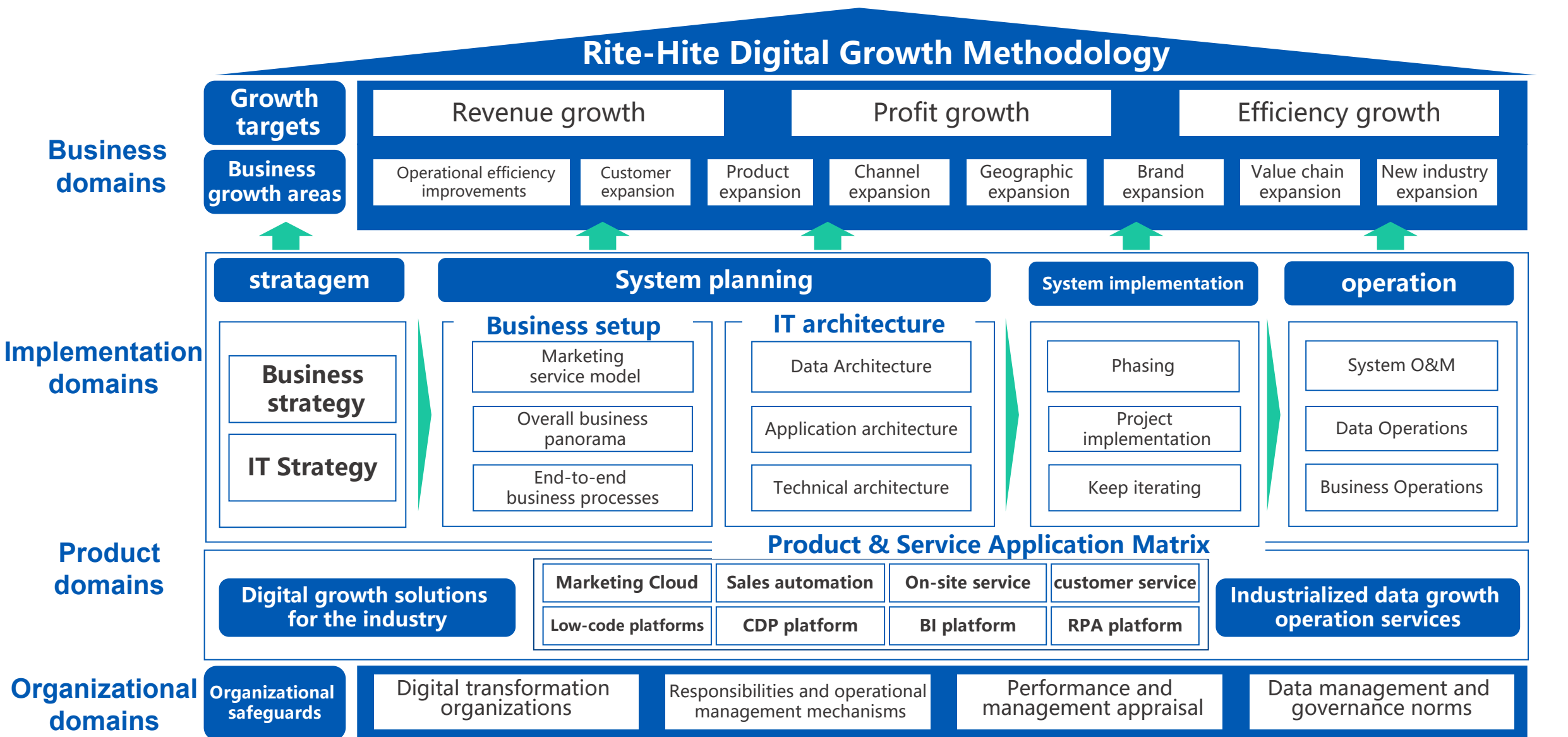
Fortune 500 and China Top 500 companies account for more than 20%.



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



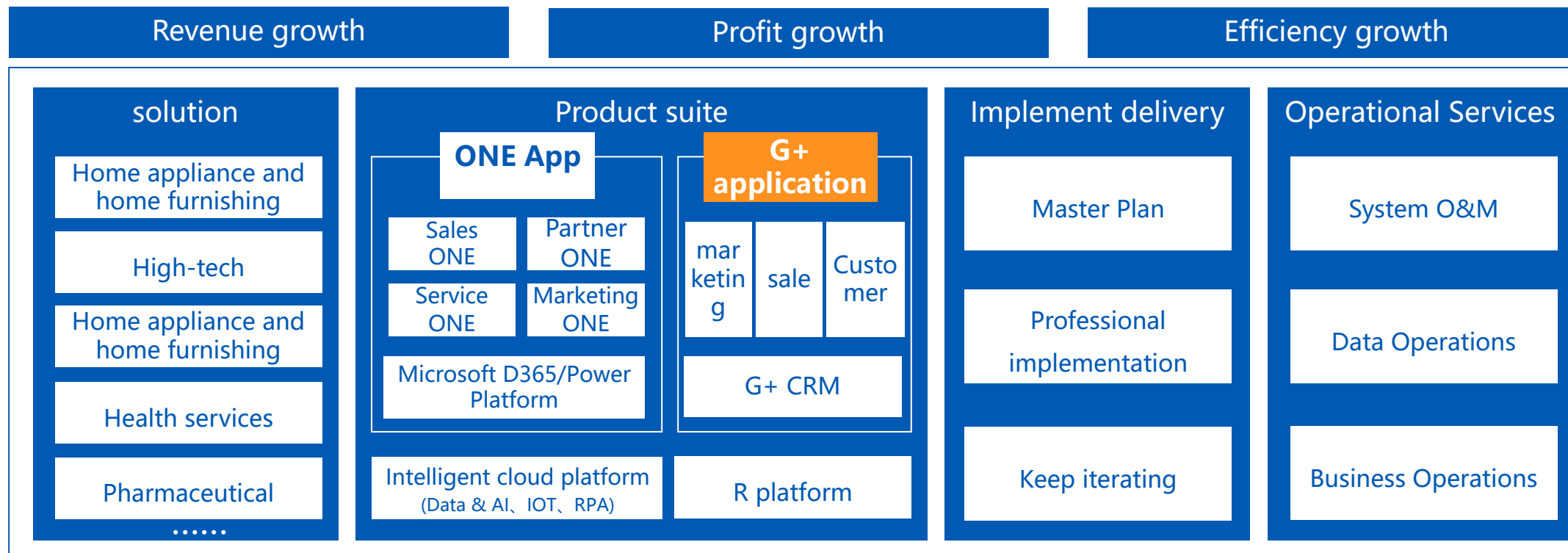
Rektec Digital Growth Methodology



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



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



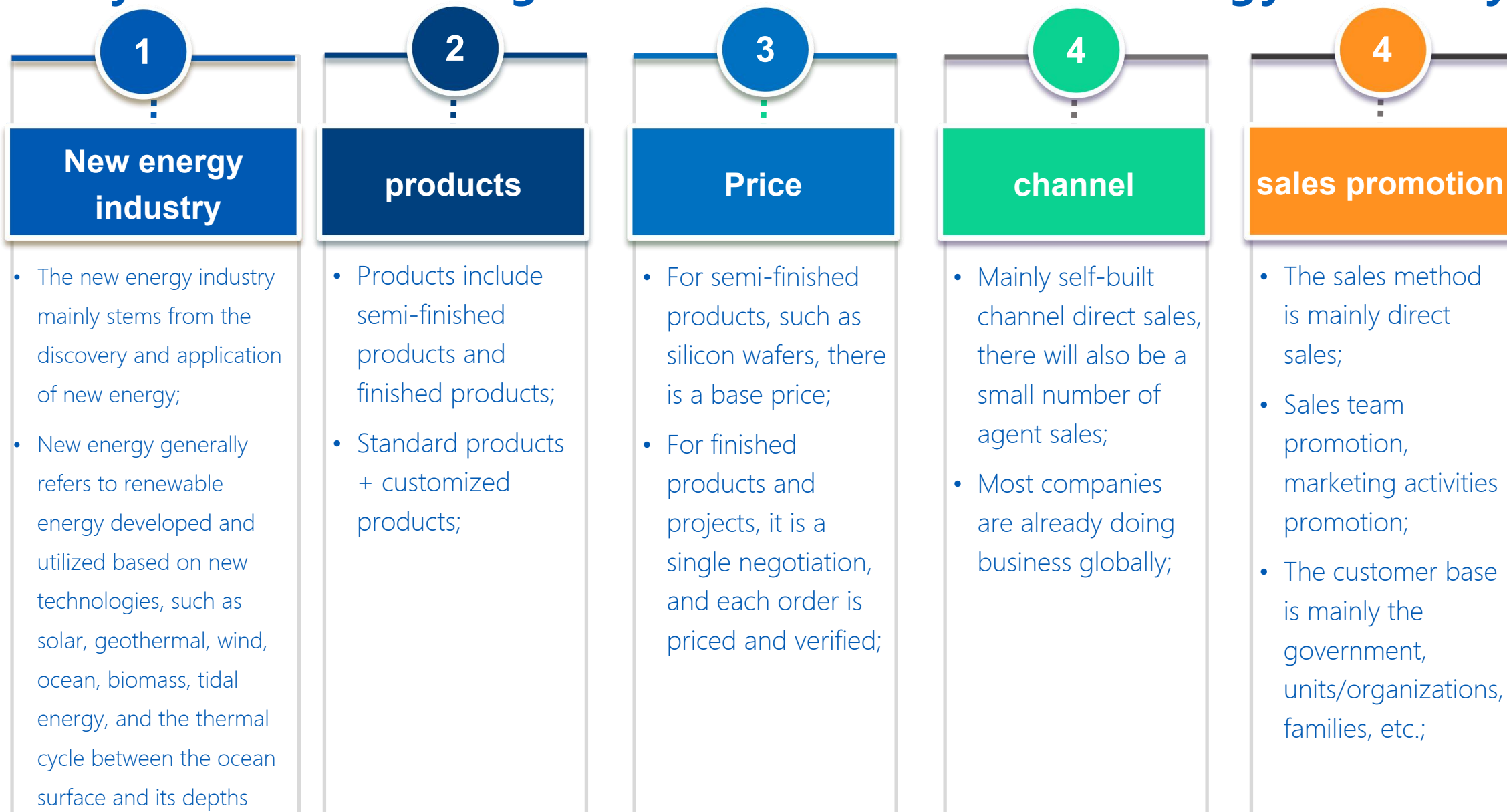
- ISO27001
- 2023 CEPREI Product Testing Certificate
- Highgo Product Compatibility Certificate

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**

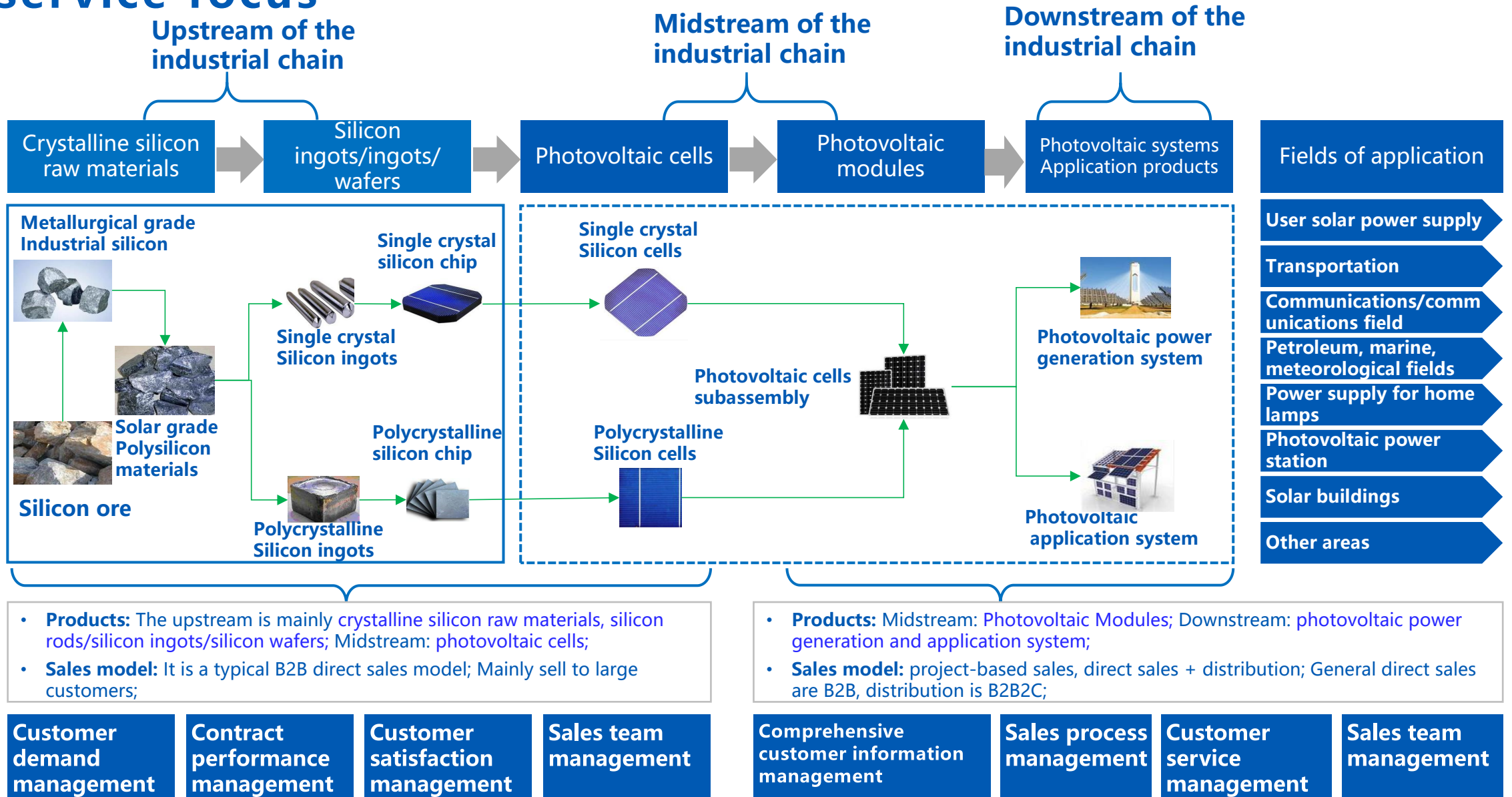
- ✓ The only service provider that has been providing Dynamics CRM business services **for more than 15 years** and has maintained continuous business growth every year, and the **number of MCP certified consultants accounts for 1/4** of the Greater China region
- ✓ **The only service provider that has 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

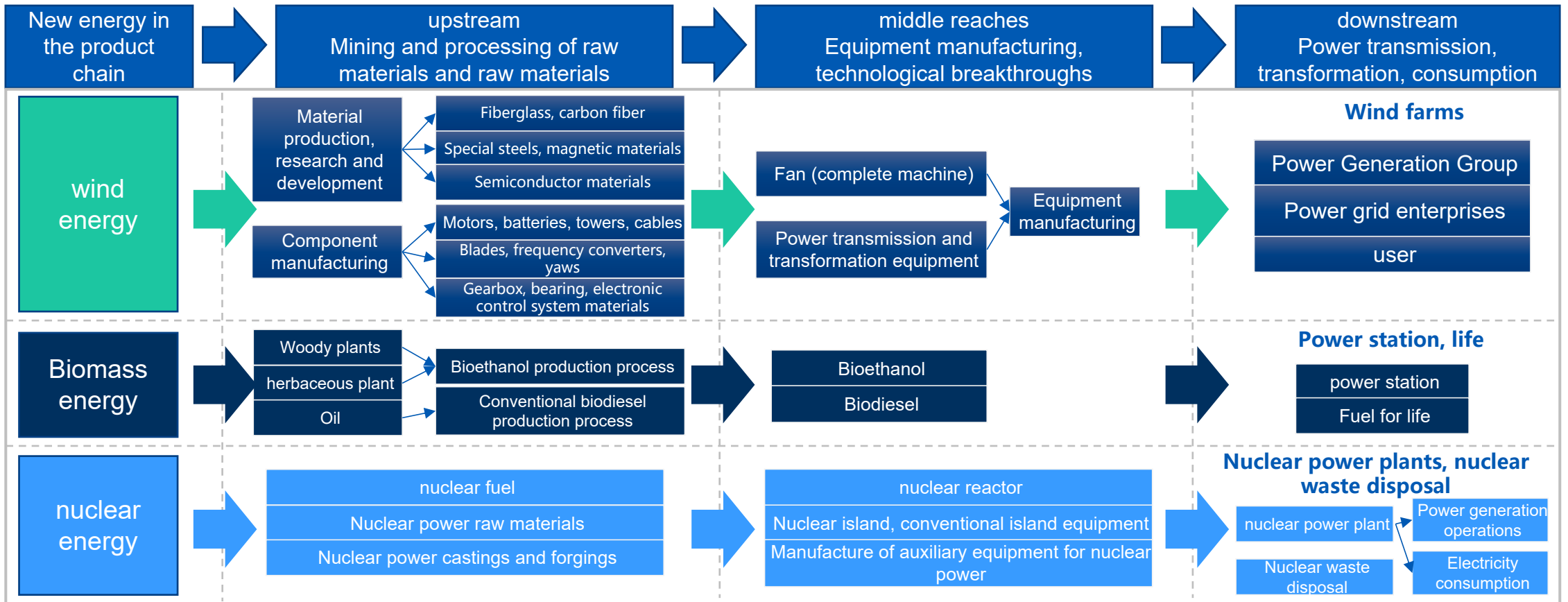
Analysis of marketing characteristics of new energy industry



Solar photovoltaic industry chain analysis and marketing service focus



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;

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

Customer demand management

Contract performance management

Customer satisfaction management

Sales team management

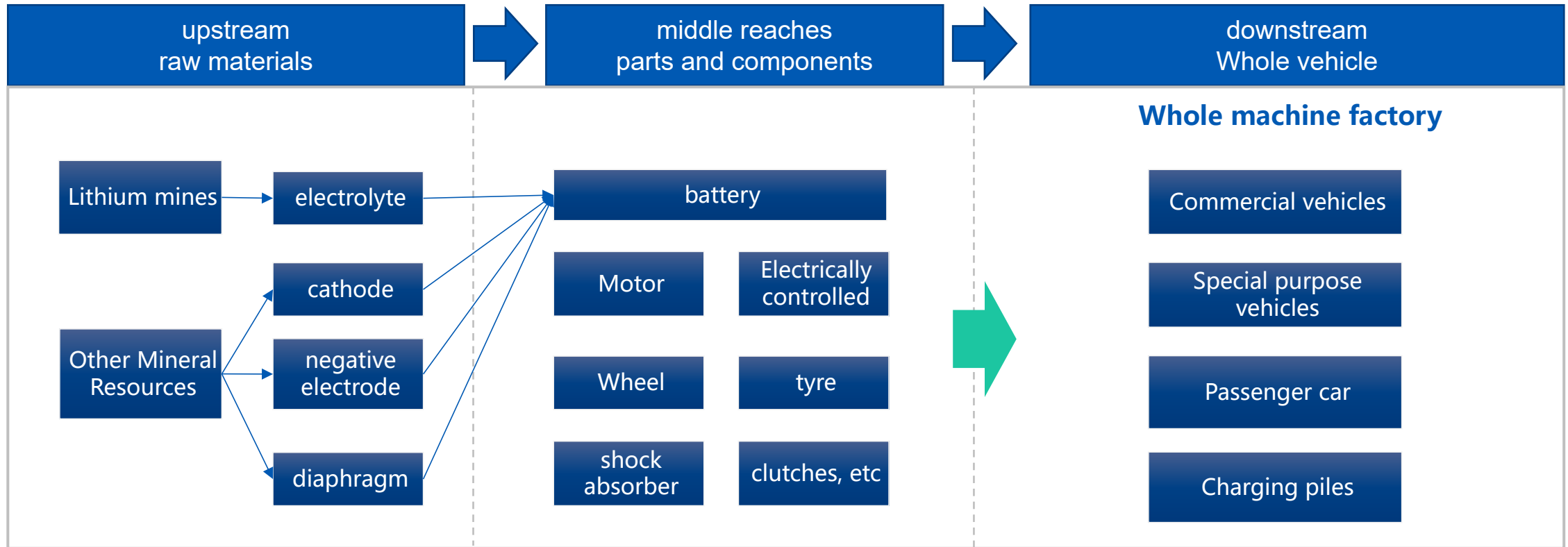
Comprehensive customer information

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;

- **Products:** midstream batteries, motors and other components; Downstream: commercial vehicles, special vehicles;
- **Sales model:** project-based sales, B2B direct sales model, mainly based on key customer sales;

Customer demand management

Contract performance management

Customer satisfaction management

Sales team management

High-tech CRM solutions for the new energy industry

Comprehensive customer information management

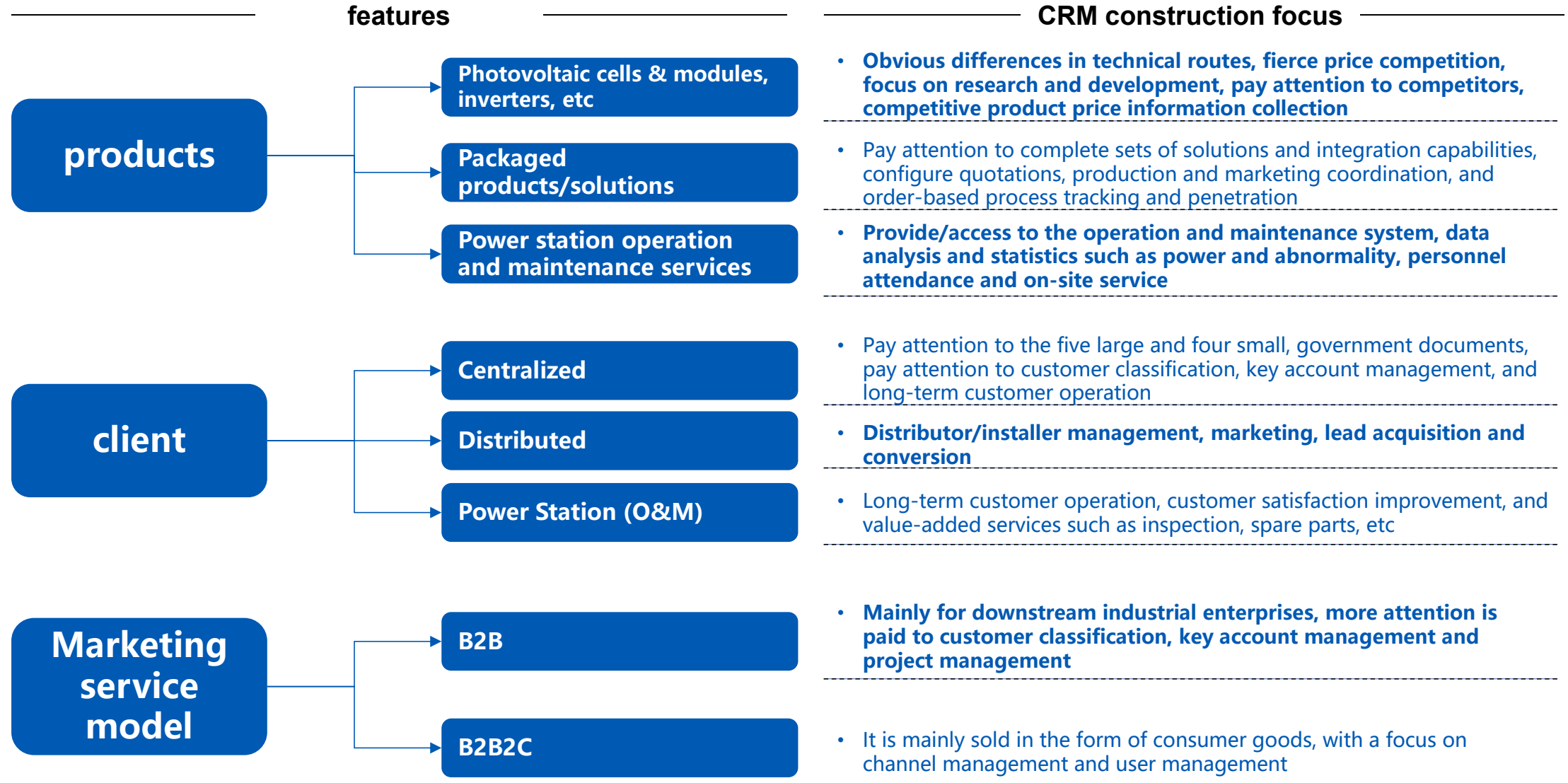
Sales process management

Customer service management

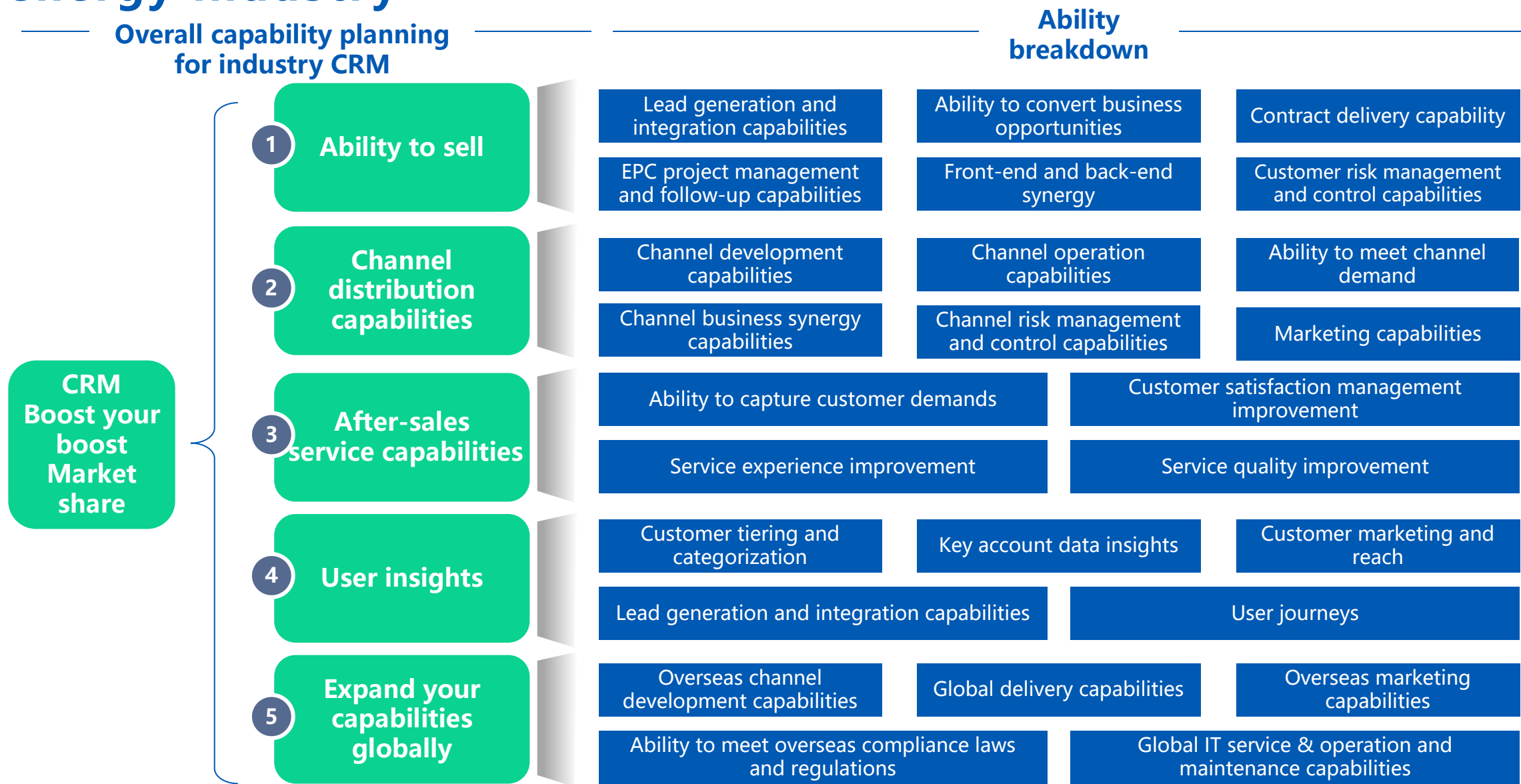
Sales team management

3 | Digital Marketing and Service Solutions

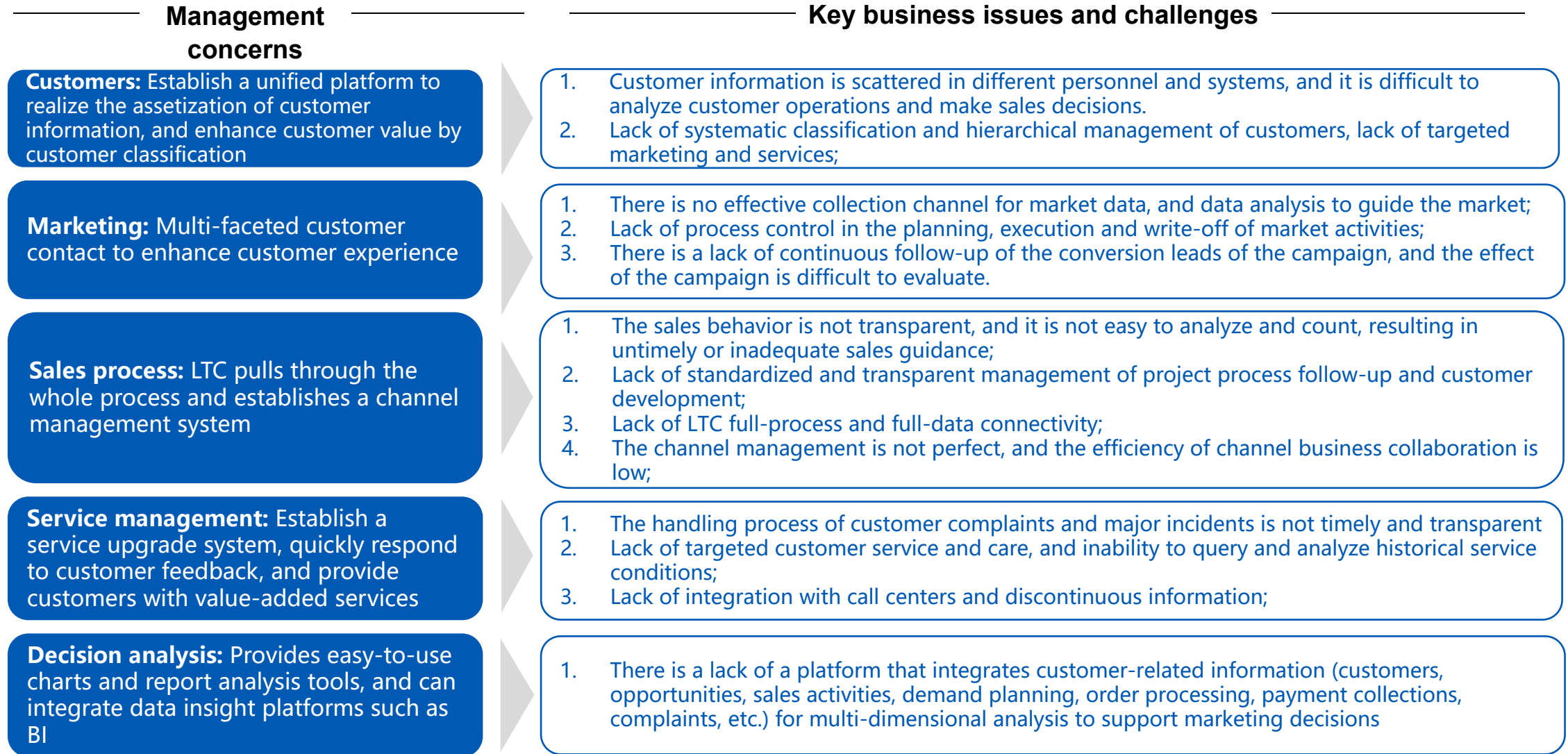
Focus on CRM construction under different products, customer groups, and marketing service models



Decomposition of marketing service capabilities in the new energy industry



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



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

Data Insights

Business front desk

| Customer analytics | | Lead analysis | | Opportunity analysis | | Behavioral analysis | | Sales analytics | | Objective analysis | | Service Analytics | | Spare parts analysis | |
|--------------------|-----------------|------------------------|-----------------|----------------------|--------------------------|---------------------|--|-------------------|--------------------|--------------------|-----------------------|-------------------|--|----------------------|--|
| client | Contact | Business opportunities | clue | Message alerts | Ticket inquiry | Spare parts request | Customer management | Lead management | Terminal Contracts | Inventory inquiry | Service Request | | | | |
| Contract inquiry | Order Inquiries | Invoicing inquiry | Payment inquiry | Video/photo | Positioning /clocking in | knowledge base | Customer Credit | Invoicing returns | Announcement/ | knowledge base | Service Progress | | | | |
| Mobile selling | | | | On-site service | | | Channel Provider/Service Provider Portal | | | | Customer self-service | | | | |

Business Middle Office

| Pre-Sales - MTL (Market to Lead) | | Sales - LT0 (Lead to Contract) | | Delivery-OTC (Order to Payment) | | | After-sales - ITR (Reception to Resolution) | | O&M |
|----------------------------------|-----------------------------|--------------------------------|-------------------------|--|---------------------------|--------------------------------|---|-----------------------------------|---|
| Market insights | Marketing | The sales process | Requirements/Contracts | Order management | Shipping/Inventory | financial management | Installation management | Service management | Power station operation and maintenance |
| market research | Campaign strategy | clue | Contract management | Orders/Changes | Shipment schedule | Invoicing management | Arrival confirmation | Customer feedback | Spare parts sales |
| Competitive research | Marketing campaign planning | Projects/Opportunities | Delivery time breakdown | Order BOM | Outbound details | Commercial Invoice | Installation supervision | Assignment of customer complaints | Value-added services |
| Market insight analysis | Multi-channel management | Quote/CPQ | Payback plan | Spare parts requirements | Shipment confirmation | Packing slip printing | Remediation management | Handling of customer complaints | Customer satisfaction |
| Target market | Summary and evaluation | Sales forecasting | Payment details | Order progress | Logistics status | Payout information | Replenishment management | Customer return visits | Power station monitoring data |
| Target customers | Lead operations | Bid management | Pre-investment demand | Returns & Exchanges | Inventory inquiry | Transactions receivable | Legacy management | Results/Scenarios | Anomaly warning |
| Channel management | Goals & Performance | Channel Agreements | Channel Profile | Channel support | Credits/Rebates | Service business | Spare parts business | Construction projects | |
| Customer management | Direct/channel customers | End Customers | Power Plant Archives | Customer classification and classification | 360° view of the customer | Customer decision-making chain | | | |

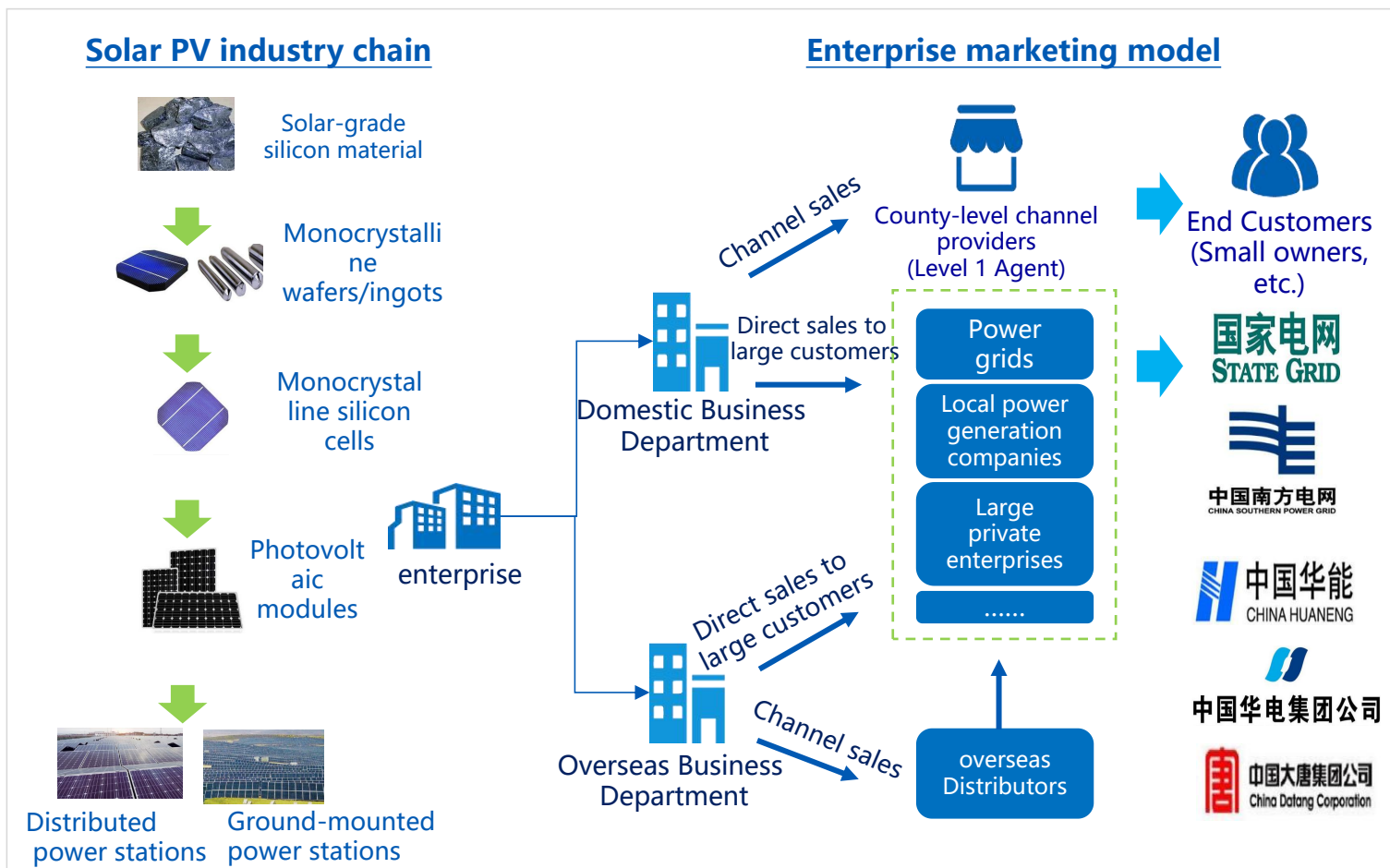
System integration

| ERP | OA/BPM | MY | WMS | TMS | APS | SRM | Electronic Contracts | Tax/Customs | call centre | Financial sharing |
|-----|--------|----|-----|-----|-----|-----|----------------------|-------------|-------------|-------------------|
|-----|--------|----|-----|-----|-----|-----|----------------------|-------------|-------------|-------------------|

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.



challenge

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 | Inverter, energy storage, smart photovoltaic cloud solution provider | Overseas sales and service of low-voltage electrical, inverter, solar energy, high-voltage electrical, etc |
| Domestic service project implementation content: <ul style="list-style-type: none">• 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. | Overseas after-sales service items: <ul style="list-style-type: none">• Germany, Spain, Portugal, Italy, Poland, Brazil, Turkey and other countries• Omnichannel builds a unified customer service workbench and integrates multi-channel customer acceptance portals• Standardized management of service, spare parts, service support, old parts and other processes | Overseas sales promotion projects: <ul style="list-style-type: none">• 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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