

# CRM Solutions for the Big Health Industry

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Rektec Information Technology Co., Ltd



**Directory** 

O1 About Rektec

Solutions for the Big Health Industry



# 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

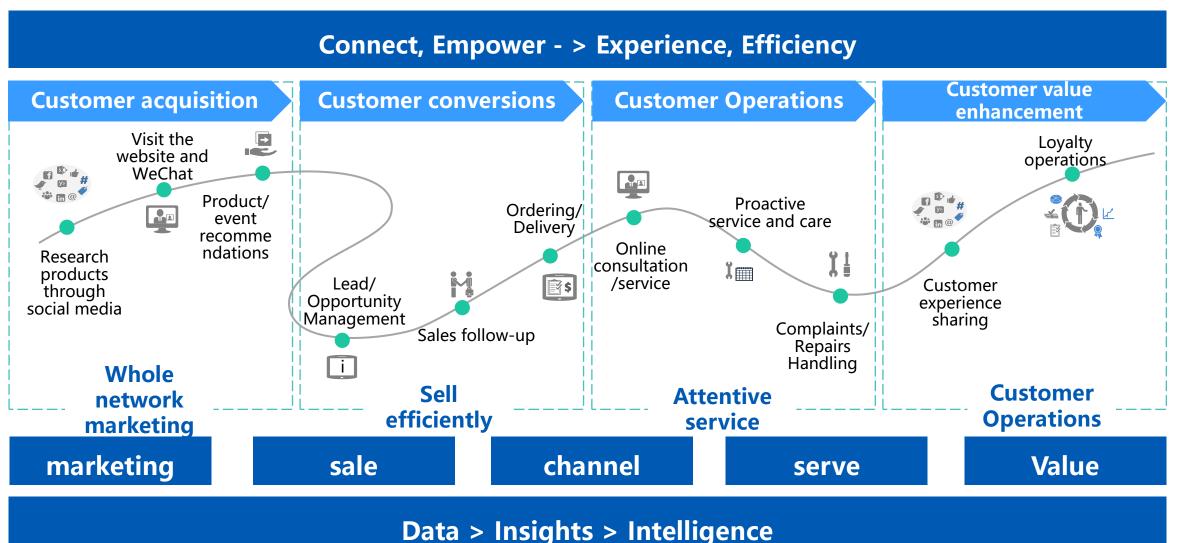
It has established cooperation with many industry benchmarking enterprises, and more than 70% of its customers are listed companies

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



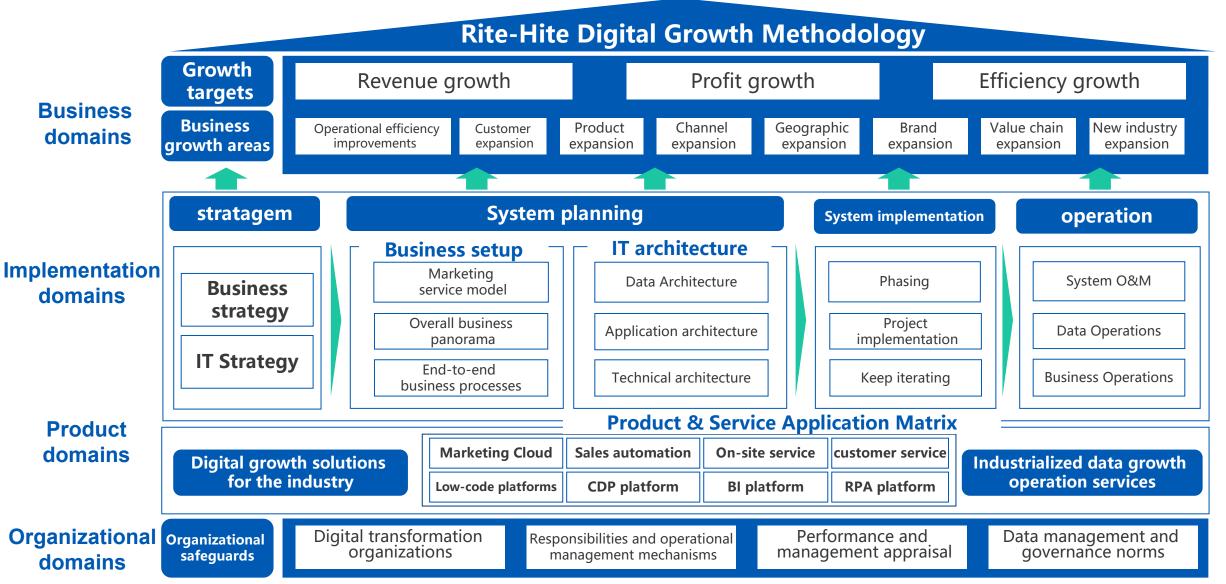


# Help enterprises build a customer-centric, data-driven digital growth system



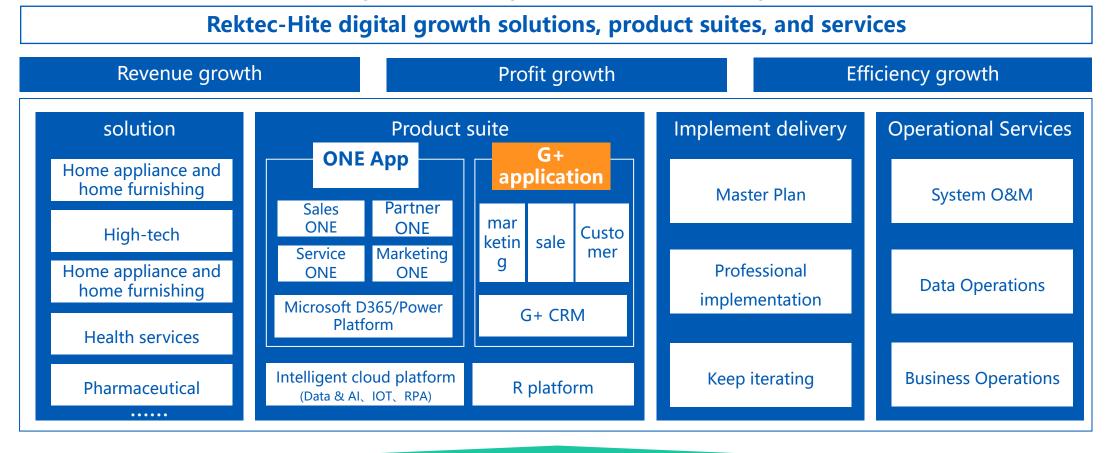


#### Rektec Digital Growth Methodology



#### 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



#### **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

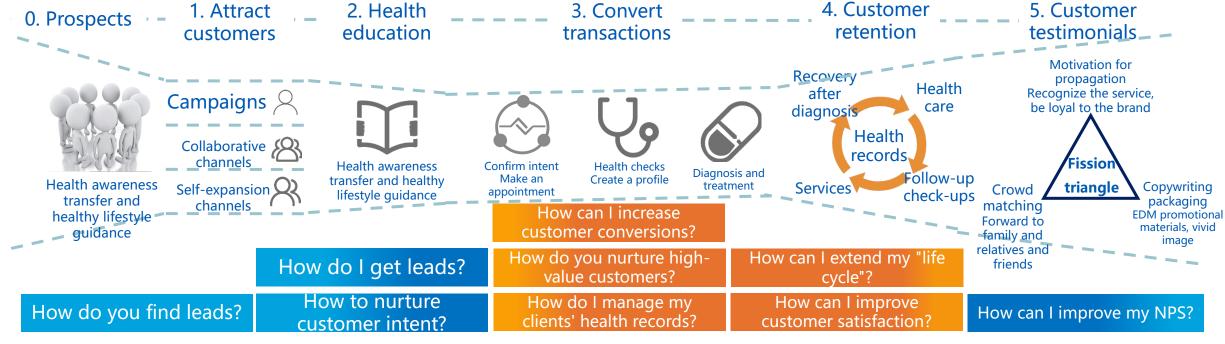
Based on CRM, mobile and cloud computing technologies, it promotes the innovation and transformation of enterprise marketing management, and is the largest Dynamics 365 CRM service provider in Greater China

- ✓ 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 Solutions for the Big Health Industry

# The medical service industry is customer-centric, with refined operation and management throughout the life cycle



### Pre-Hospital: Health Prevention

In the hospital: diagnosis and treatment

Post-hospital: Rehabilitation care

healthy concern

healthy consult ation healthy monito ring

healthy guide

patie

to the hospita

healthy examine

disease diagnosis Payment treat

Hospitalization/
Take your

Discharge/ Discharge

Post-hospital rehabilitation

healthy care

Family healthy

- Promote health knowledge online, spread healthy lifestyles, and continue to interact with customers
- Online and offline multi-channel drainage and customer expansion, accurate positioning of customer sources
- Online consultation/appointment to provide efficient medical services
- Gather excellent sales experience, precipitate standardized sales methodology, help enterprise sales development and cultivate high-value customers, improve organizational capabilities, and reduce enterprise training costs
- HMO packages, card coupons, value-based medical guidance, diversified marketing policies, improve the effect of patient health management
- Integrate customer health information, establish 360° health records of patients, and do a good job in health planning
- Based on the customer diagnosis and treatment plan and the return visit care plan, we regularly visit customers and do a good job in customer health care
- Do a good job in customer loyalty management, retain every customer who comes to the store, do a good job in optimizing existing customers, and cultivate more incremental customer leads



Online and offline multi-channel customer acquisition, the first confirmation system rules are verified, and the source channel is confirmed

channel

#### **Social** media

Online customer service push Brand push New media \_operations E-commerce

#### Marketing for all

Referrals **Employee** testimonials Recommendation

#### Marketing **Campaigns**

insurance

#### community

Arrive at the hospital

#### 400 push

usiness

System

push

Manual

mainte

nance

**Push** 

push

Marketing for all

Online event customers Offline event customers

Insurance confirmation

on your own

Sales self-extension

#### prospective



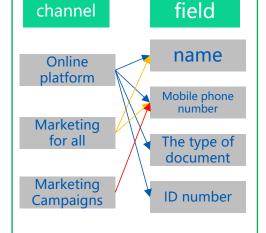
dockina Intent to know Constant communication Intent to submit

After the sales manager expands the customer, he manually maintains the customer information in the **CRM** system

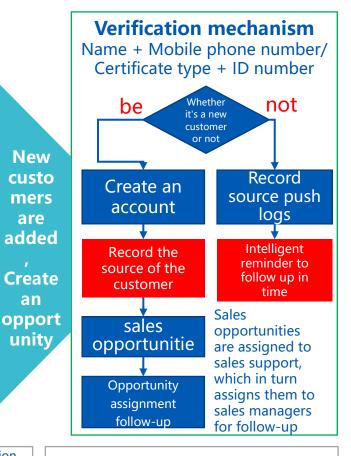
#### **Customer delivery,** first confirmation

#### **Channel customer** information verification

Different channels, dynamically set the channel threshold, and only after passing the necessary information verification can customers be created in the CRM system



#### **Uniqueness check**



Based on the data indicators, multidimensional data analysis is carried out in combination with the implementation of activities

#### Pu sh CU sto me rs

Co nfi rm the SO urc

- Establish a unified lead channel management process, formulate implementation specifications, and update requirements regularly
- Clarify the project objectives, set data indicators after dismantling the dimensions, and detect the execution effect of activities based on the indicators
- Set the **user behavior tracking point**, and get new ideas or discoveries from the user behavior to adjust the direction of the activity
- In view of the complete collection of information of potential customers, an assessment system is established and strictly standardized
- Establish a distribution mechanism for potential customers to effectively carry out secondary cultivation and follow-up

#### operation In the tank

# Improve the customer experience and increase conversions with efficient, automated service processes

The sales process
Visualized management

Inquiries of interest

Initial health check-up

Doctor's diagnosis

Diagnosis and treatment plan

Confirmation of the plan

Contract signing

Recycling

rules

Doctor treatment

Sales leads Intelligent management

Lead grading

Lead Clue Differential interaction

Ongoing follow-up **Smart assistants** 

Follow-up Pr rules

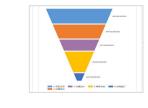
Promotion Rules

Sales team Online management

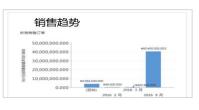




Insights
Coaching
sales



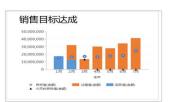
Sales funnel analysis



Sales trend analysis



**Customer analytics** 



Goal achieved



Follow-up workload analysis

operation
In the tank

- Establish a unified clue follow-up process management, and set up an assessment management mechanism to view the implementation of each stage
- Establish a unified clue hierarchical management model, formulate implementation specifications, regularly analyze the follow-up and conversion effects of clues at each level, and optimize the model
- In view of the complete collection of clue information, establish an
   assessment system and strictly standardize its implementation. It is
   recommended to add it to the performance appraisal system, which can
   effectively improve the digital precipitation of customer information
- For the lead pool, establish a lead recovery and distribution mechanism to effectively follow up each channel lead and maximize follow-up conversion



#### Customer-centric, establish multi-touch service management, and improve customer satisfaction

client



media

























contact

Social media **External media** 

E-commerce Video platforms

Own mall

WeChat APP

call centre

**Stores** 

products

Guide

Marketing for all

Official platform

**Stores/Smart Devices** 

limit

hope

tube

reason

**business** scenario

**Automated services** Online bot answers self-service

**Smart services** 

Channel **Services** 

Personalized

Video services

Personal Health Consultant

Reminders throughout the treatment

wear ability business time

Value-added services

Community interaction

Remote diagnostics

Health talks

Overall synergy **Service** capability

Basic services

Consulting services

**Complaint Handling** 

Product/service description

operation In the tank

#### **Proactive Service - Service Care Management**

- Based on the interactive behavior of customer service, set the behavior buried point, and regularly count and analyze the customer's high-frequency service and optimization direction
- Collect and analyze the frequency and coverage of customer active care services, and update the care rules regularly

**Passive Service - Service acceptance management** 

- Establish a unified service management process, formulate implementation specifications, and update requirements regularly
- Define key service nodes, **set assessment indicators**, and detect customer service effects based on indicators
- Set up a return access volume, record the results of customer feedback, and regularly evaluate the effectiveness of the service

The essential index

- Service Effectiveness Analysis Examine the frequency of self-service interactions, whether all of them generate interactions, and update services regularly
- Service Coverage Analysis Examine the service coverage of Family Care and Order Care to see if all high-value customers have been cared for
- Service Coverage Analysis Examine the service coverage of family care and order care,
- **Service acceptance analysis**: statistical analysis, acceptance of consulting complaints and analysis of processing timeliness
- Return visit execution analysis: Statistics on the implementation of return visits, investigate the enforceability of return visit rule design based on the results, and update the rules based on the results
- **Service feedback analysis:** statistics of customer satisfaction, to do the overall improvement



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