

CRM Construction Solutions for the Industrial Goods Industry

Rektec Information Technology Co.,Ltd

2025-04

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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

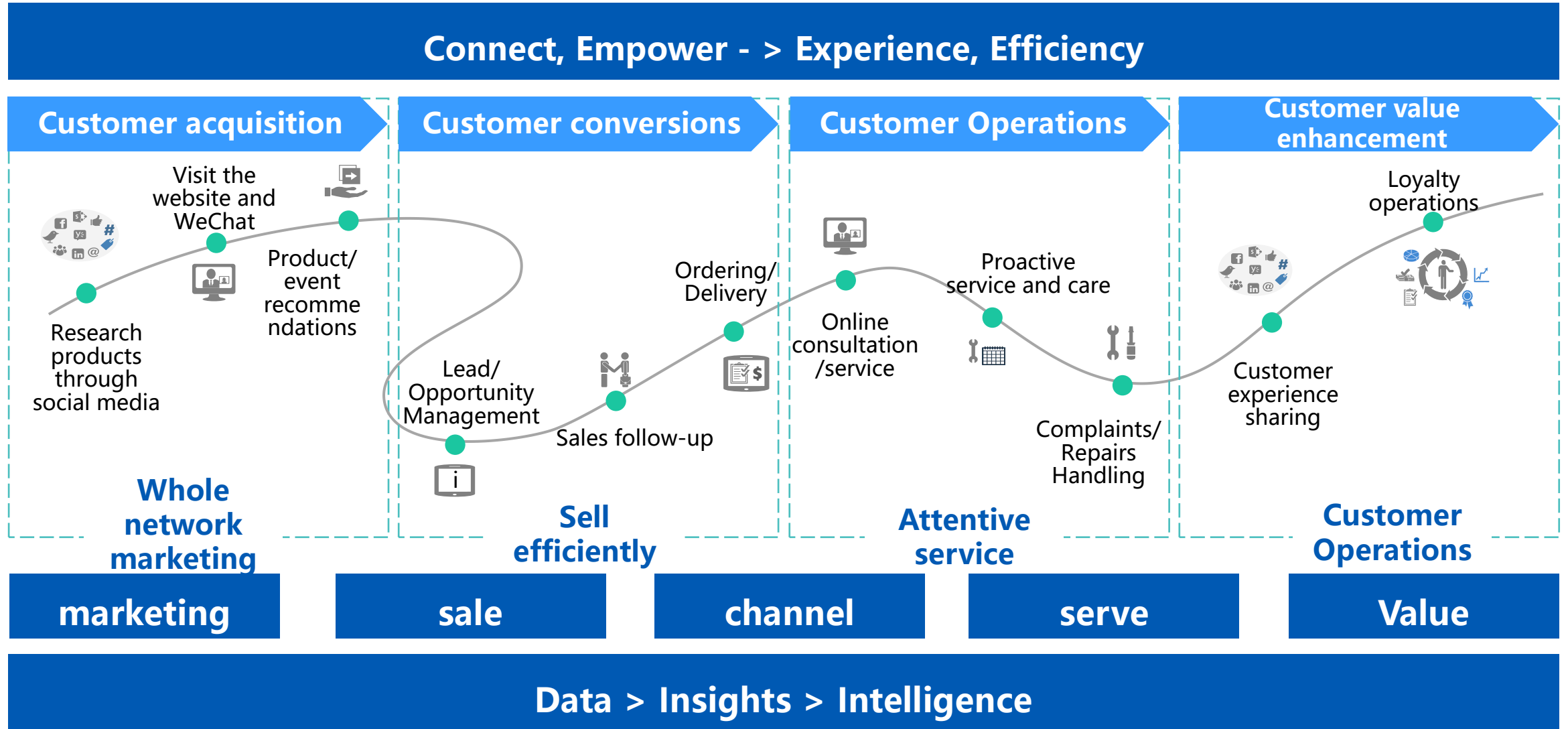
800+ successful customer cases

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

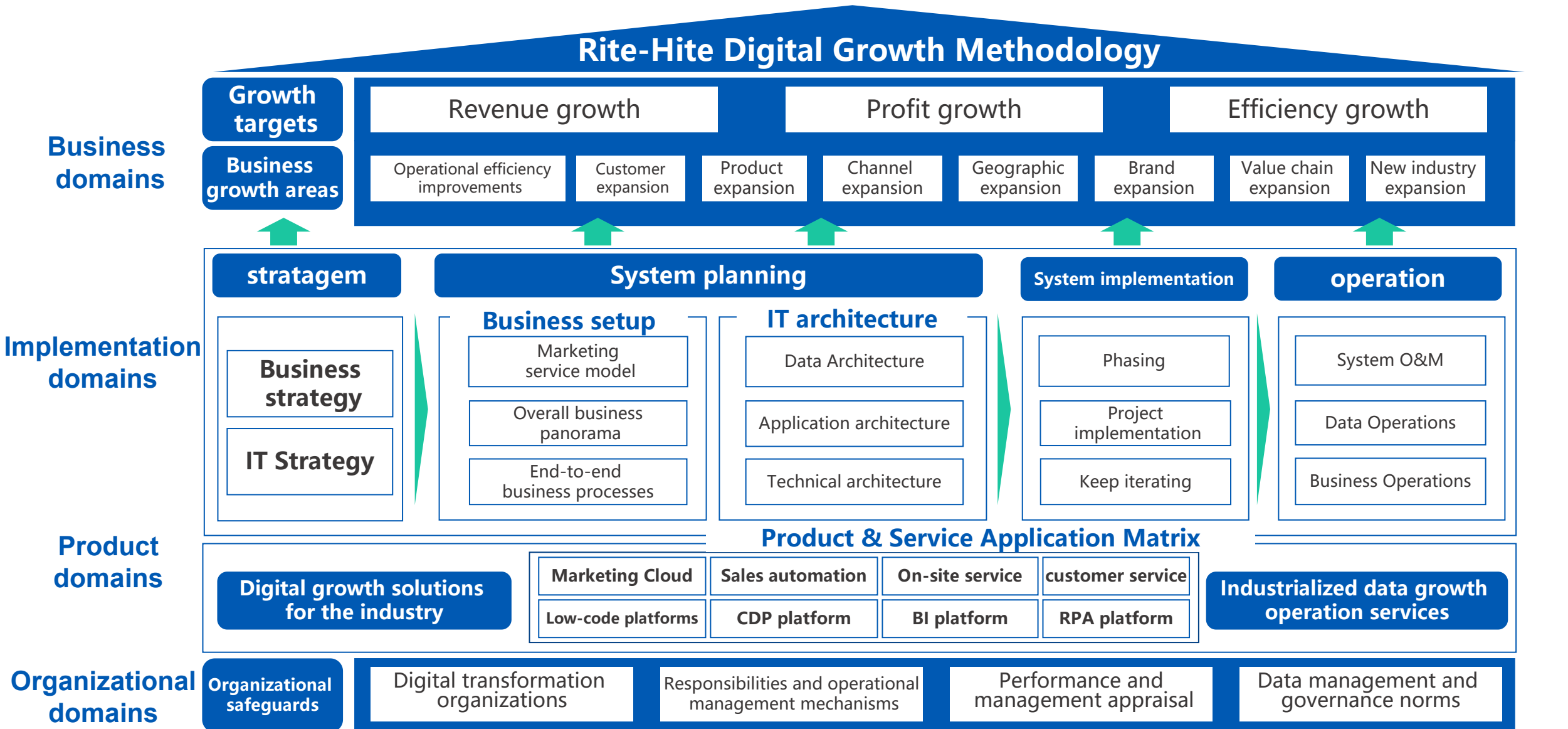
Fortune 500 and China Top 500 companies account for more than 20%.



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



Rektec Digital Growth Methodology

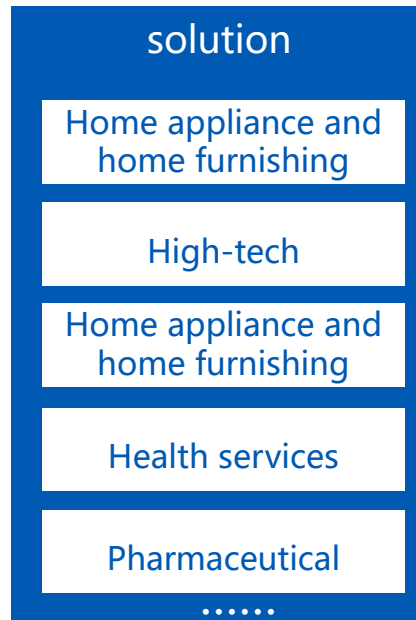


Rektec digital growth solutions, product suites, and services

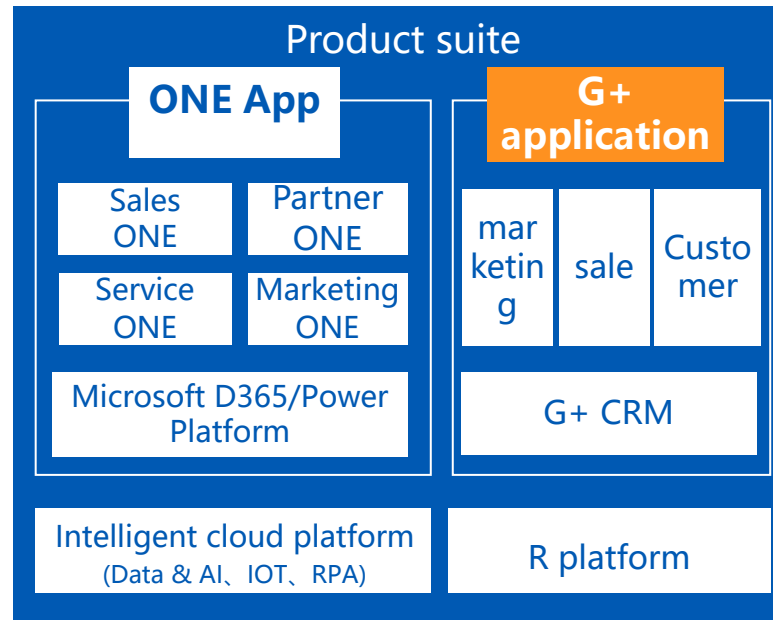
With the help of digital growth methodology, project implementation is carried out based on mature industry solutions and product suites, and continuous value creation for enterprises through operation management to accelerate enterprise growth

Rektec-Hite digital growth solutions, product suites, and services

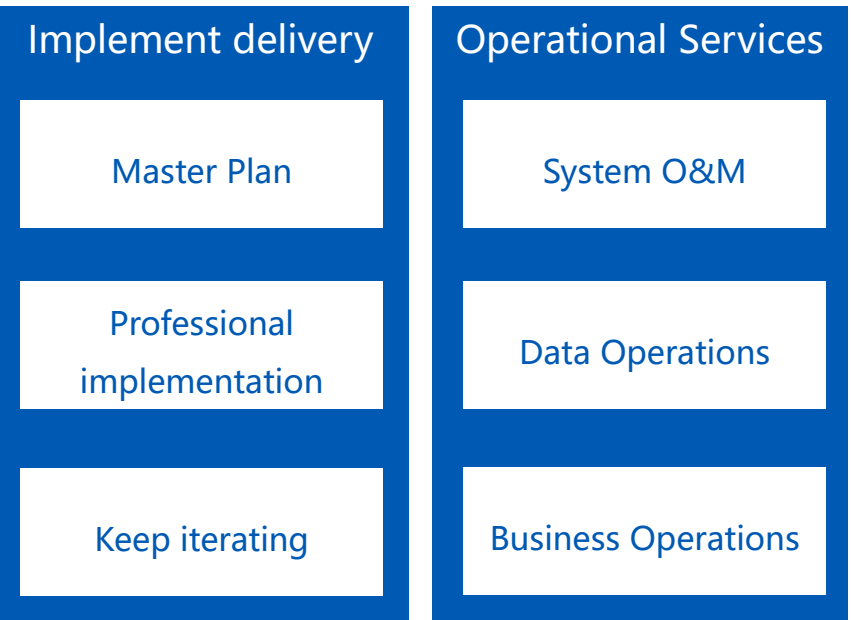
Revenue growth



Profit growth



Efficiency growth

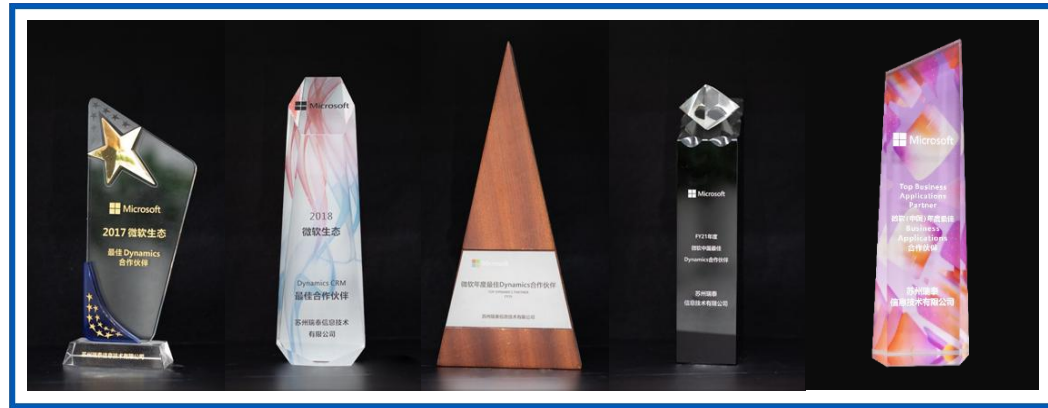


Digital Growth Methodology

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 | CRM Solutions for the Industrial Goods Industry

Challenges faced by industrial manufacturing and the direction of future transformation

Problems faced by the industry

Labor costs are rising



The added value of the product is low



Demand customization



Breaking the game

More efficient
(Intelligent Manufacturing)

More autonomous
(Independent R&D and brand promotion)

More precise
(Multi-channel customer contact to obtain accurate needs)



The road to industry transformation

Product-centric



Sell products



Keep an eye on the deals



Focus on costs and profits



Domestic sales



Customer-centric

Products + Services

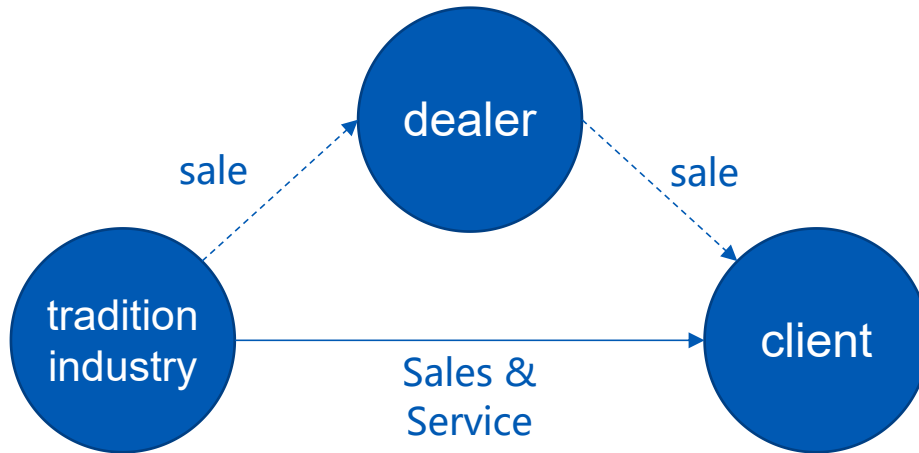
Focus on the customer

Focus on customer/product value

Overseas sales

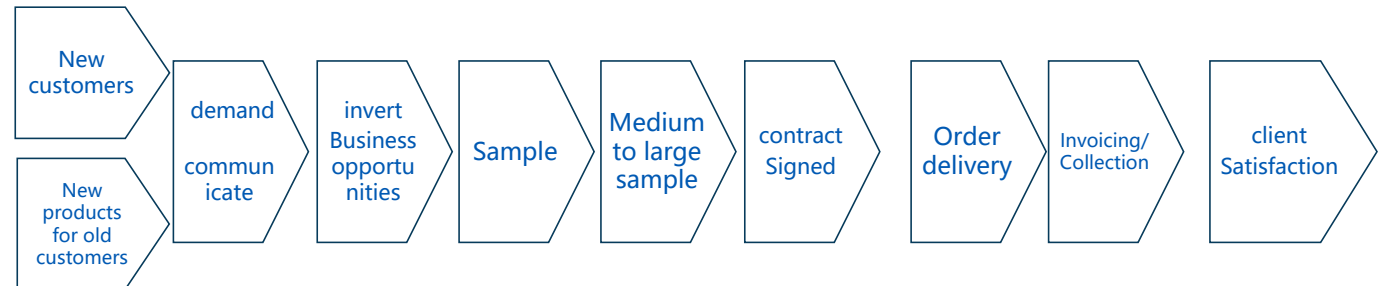
The marketing operation of industrial products manufacturing enterprises focuses on the focus

Product-driven selling



- **Traditional industries:** such as large chemicals, raw materials, etc.;
- **Industry characteristics:** multi-product development (multiple product categories), group (multi-molecule company);
- **Products:** There are many product categories, the products are more standardized, the price is lower, and the sales are in batches;
- **Sales model:** a typical B2B model, for distribution, it is sold directly to dealers, and then sold by dealers to customers; Generally, the requirements for salespeople are not high, and in most cases, one person can complete the sale;
- **Focus on:** internal sales operation management and efficiency improvement;

Timely order delivery and customer complaint service to improve customer satisfaction



Customer demand management, share and competitive product analysis, mining customer opportunities, group customer management



1. Based on the IDIC model, build a customer life cycle management system

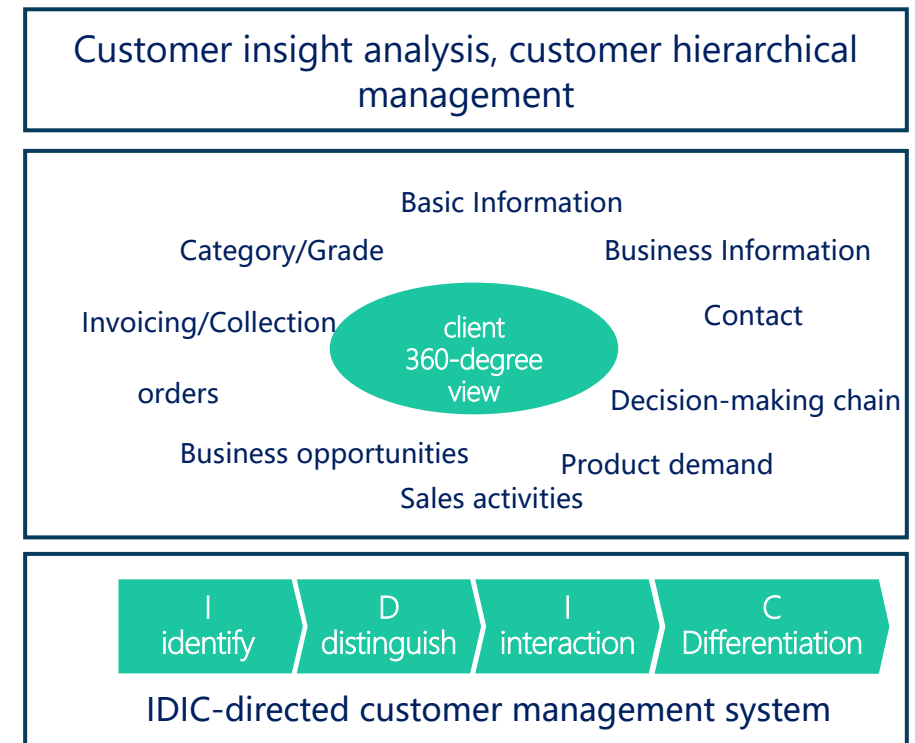
Establish complete customer profiles and 360-degree views of customers, and realize customer insight analysis and customer segmentation management

Business focus

1. Customer information is scattered in the hands of salesmen, and there is a lack of unified and complete customer files;
2. Lack of panoramic view of customers, customer data such as visits, orders, shipments, and payment collections cannot be queried in a unified manner;
3. Lack of customer analysis to keep abreast of customer development/maintenance progress and sales;
4. There is a lack of data to guide customer classification, the implementation of classification policies cannot be tracked, and customer classification management cannot be implemented.



Solution architecture



2. Establish a closed-loop management system for marketing activities

- Institutionalize marketing activities and evaluate the output and benefits of marketing activities for continuous improvement

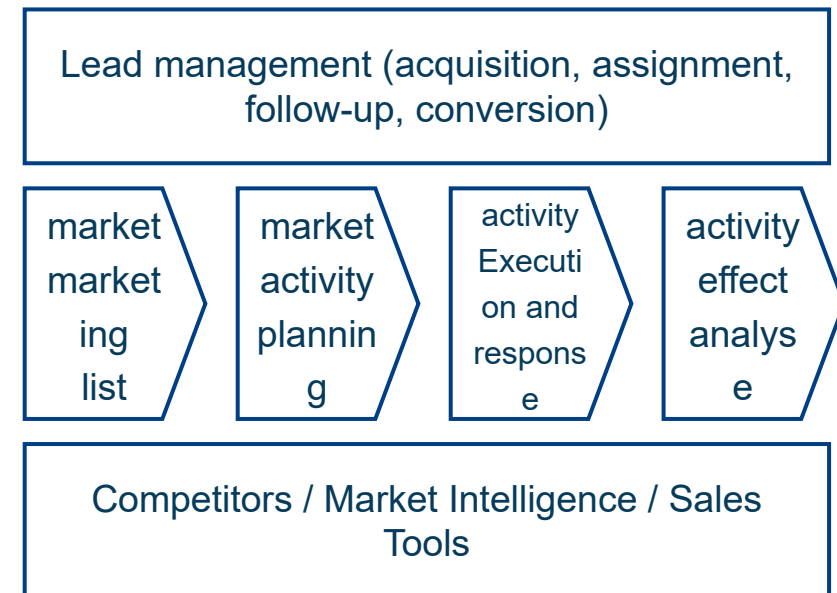
Develop leads across multiple channels and track lead conversions to continuously optimize delivery channels and increase return on investment

Business focus

1. How do you analyze the inputs and outputs of each campaign?
2. Does the salesperson follow up on the assigned leads in a timely manner?
3. What is the lead conversion rate by channel? Is there any need to adjust the marketing channels?
4. How to share competitor information and sales tools with salespeople in a timely manner?



Solution architecture



3. Establish a sales funnel system to standardize, standardize and transparent sales process management

Standardize the sales management system, realize the whole process of sales process and sales activities, and improve the success rate and forecast accuracy of business opportunities

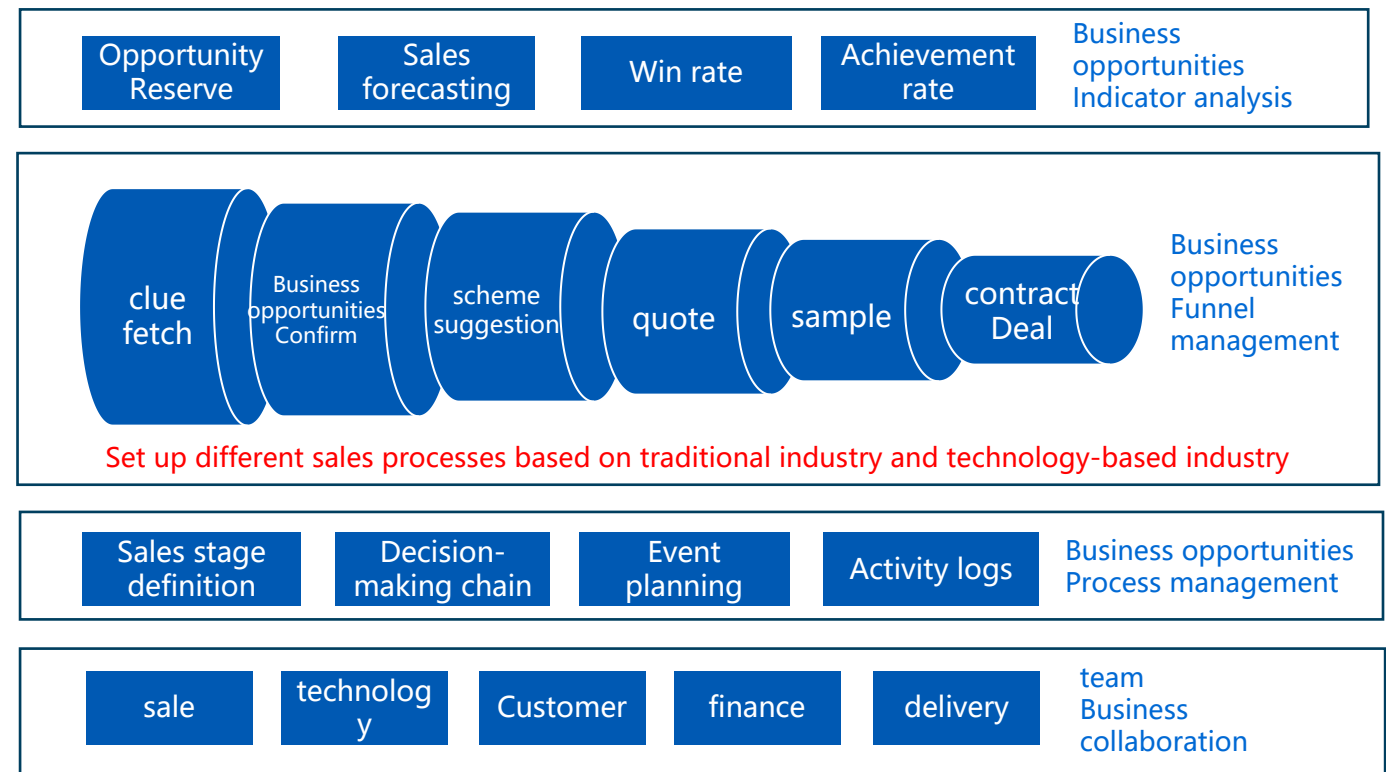
Business focus

1. What is the sales performance of each team/rep? Which team/representative is at risk of compliance?
2. Have the teams and representatives followed up on business opportunities according to the company's requirements?
3. What is the progress of the key projects?
4. What is the win rate? Lost Competitors and Lost Orders?
5. What are the sales forecasts for the next month and quarter?

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Solution architecture



4. integrate and open up ERP to achieve order delivery process tracking

Open up ERP, track the progress of delivery, invoicing and payment collection of orders, and ensure timely delivery of orders and timely collection of payments

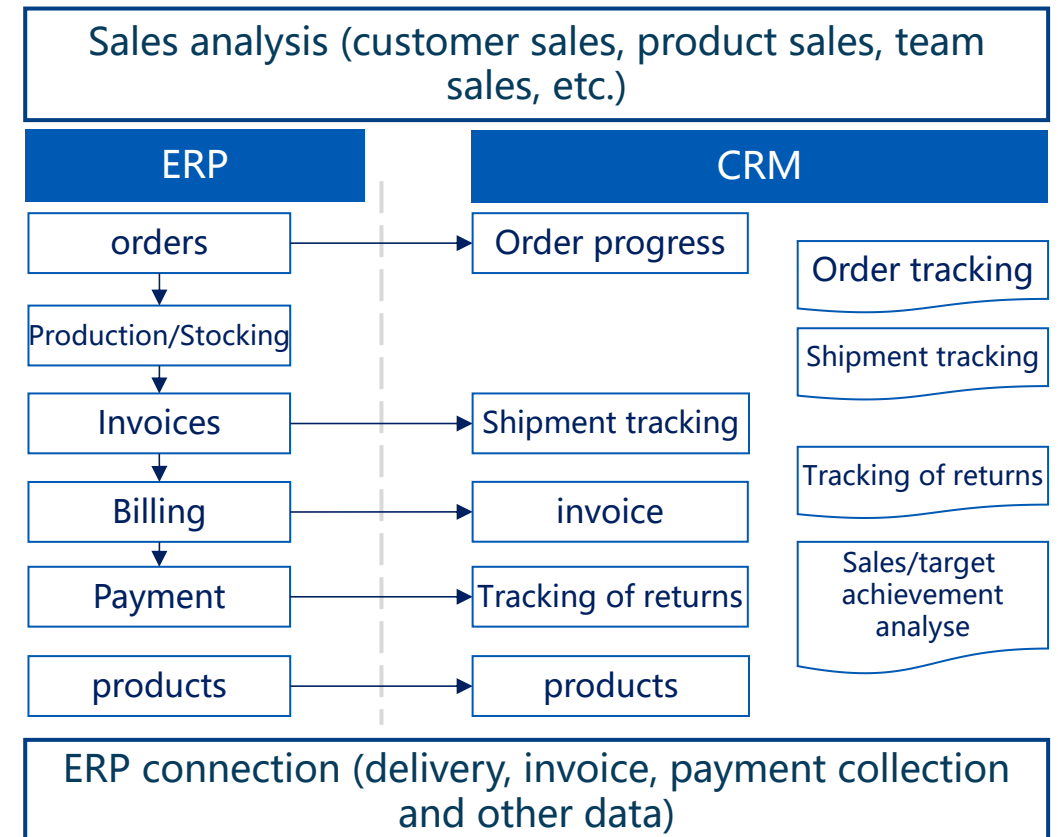
Business focus

1. How is the order processed? What is the progress of the shipment? whether there is a risk that it will not be delivered in a timely manner;
2. Are orders invoiced in a timely manner? Is the invoice timely returned? Is it overdue?
3. What are the customer's recent sales? Is it up or down compared to previous years?
4. What is the sales and payment collection situation of the team and representatives so far? Can it be met?

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Solution architecture



5. Establish a closed-loop ITR customer service management system to improve customer satisfaction

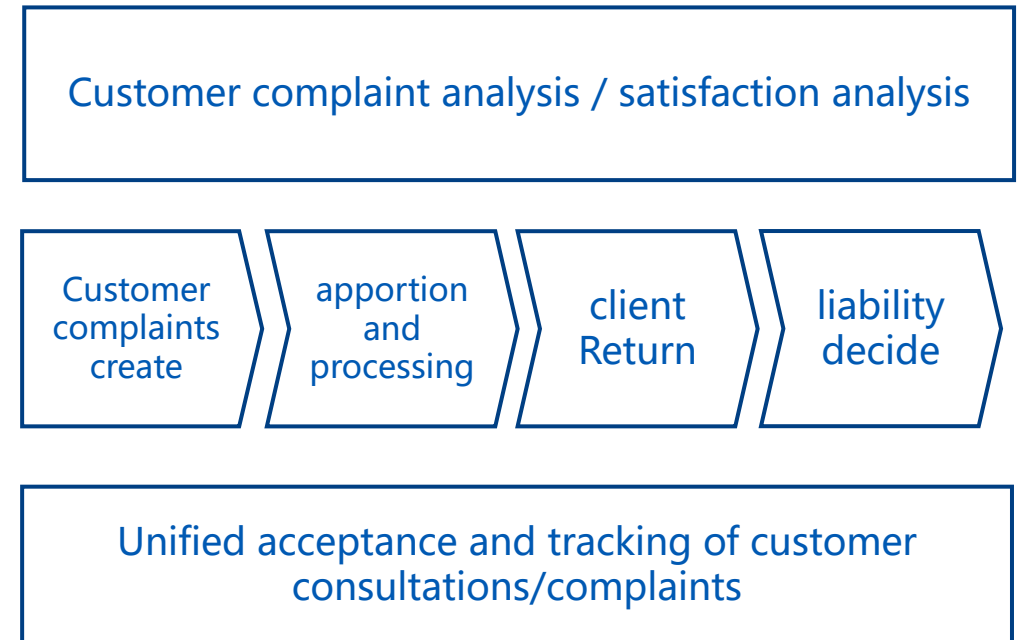
Unified acceptance and tracking of customer consultations/complaints, and closed-loop management of the customer complaint process to ensure timeliness of processing and improve customer satisfaction

Business focus

1. Is there anyone following up after receiving a customer complaint to ensure that it is dealt with in a timely manner?
2. What is the progress of customer complaints?
3. What is the result of the handling of customer complaints? Does the customer accept the results?
4. What are the causes of customer complaints and the determination of liability? How to improve in the future?
5.



Solution architecture



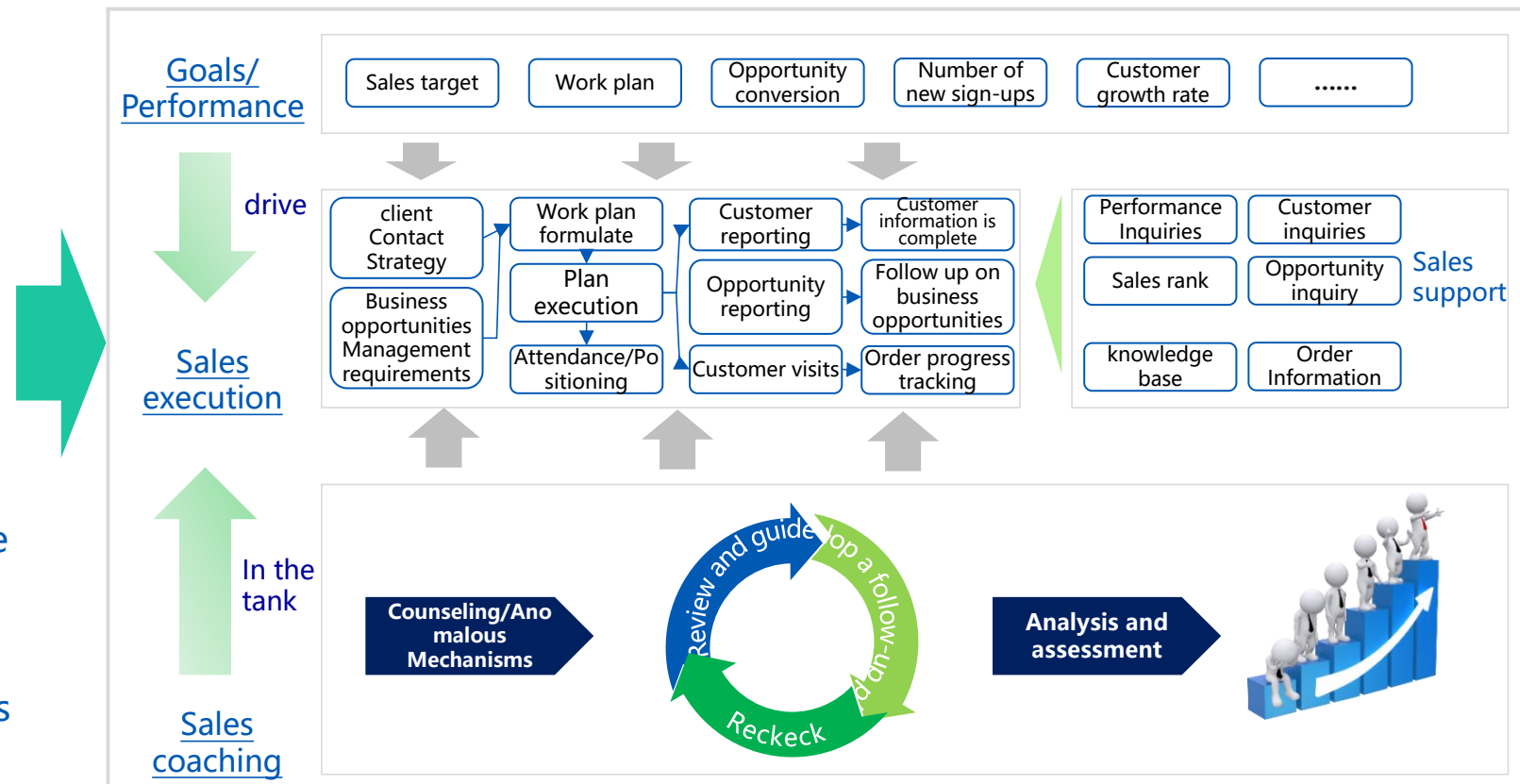
6. Empower the sales team through the mobile terminal to realize the mobile office and sales support of the sales team

Based on data, it can guide the formulation of sales personnel's work plans, evaluate the rationality of sales activities, empower teams through knowledge base and mobile APP, support better sales, and analyze personnel performance at any time for targeted coaching

Business focus

1. Personnel performance and job evaluation are not supported by data and facts, which is time-consuming to sort out, and sales cannot see the performance in real time;
2. The supervisor is unable to plan and execute the work of the sales staff, and cannot give timely coaching;
3. Lack of a unified knowledge base platform, slow knowledge transfer, mature sales experience can not be precipitated;
4. Salespeople cannot easily access data, work collaboration is poor, and business follow-up efficiency is low.

Solution architecture



3 | Customer Case Sharing

We are the benchmark customer in the industry

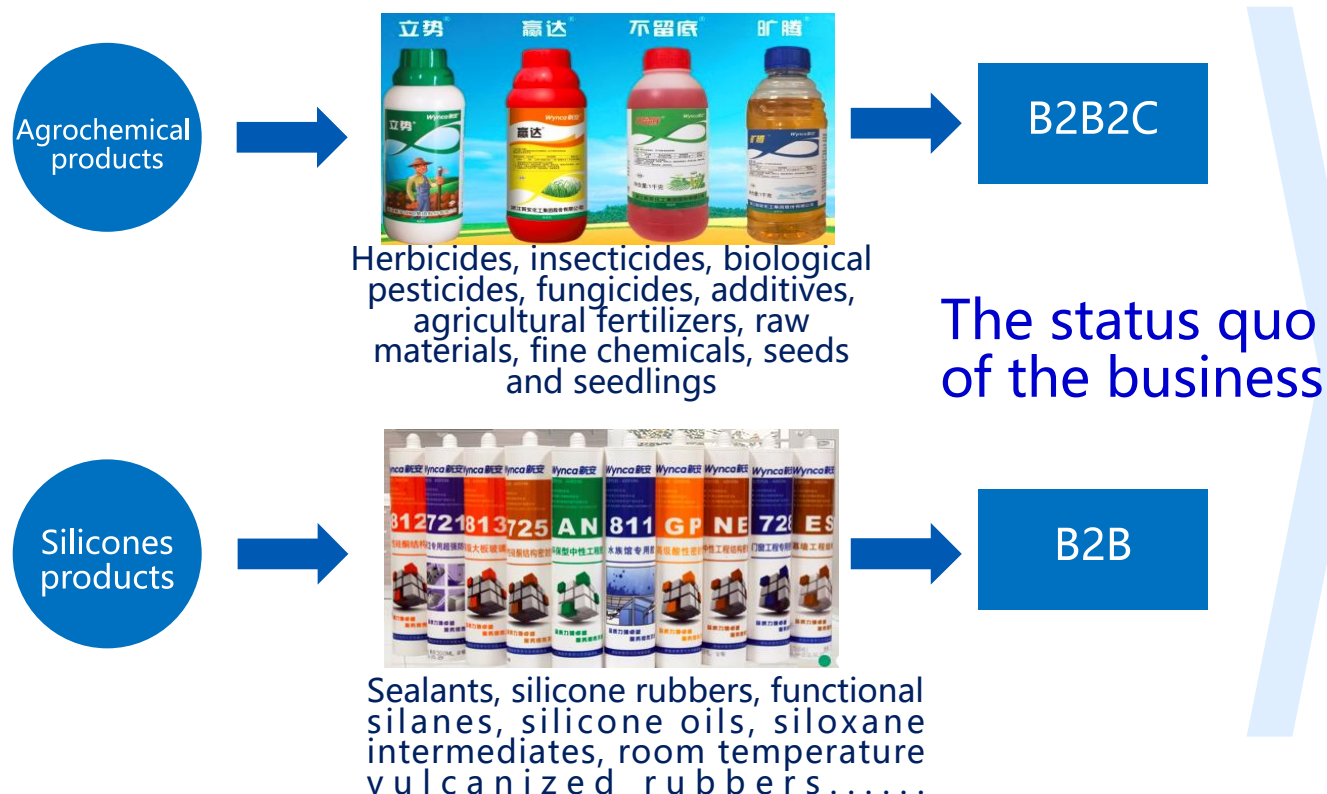


1. **Open up the end-to-end process:** open up the whole process of leads, business opportunities, quotations, orders, payment collection, etc., and improve operational efficiency;
2. **Customer value management:** classify the value of customers, formulate different customer marketing service strategies based on different customers, and enhance customer value;
3. **Forecasting and sales analysis:** grasp customer demand planning, effectively formulate sales forecasts, track the progress of orders, shipments and payments, and analyze forecasts;
4. **Focus on customer satisfaction:** timely response and handling of customer complaints, regular active service, improve customer satisfaction, and achieve long-term strategic cooperation;
5. **Empower the team:** drive sales business development through goals/performance, and improve the work efficiency of the sales team through mobility;

*Some customers of chemical enterprises

Customer case 1: CRM project of Company X

- ✓ X customer is engaged in **the sales of agrochemical products** and **silicone products**, and the agrochemical products are mainly based on the B2B2C distribution model, and the sales mainly rely on the in-depth operation of channels and terminals; Silicone products are mainly sold in a B2B direct sales model, and sales mainly rely on **the development of new customers and continuous orders from existing customers**.
- ✓ The overall business pays more attention to: **customer resource assetization, big data, refined and standardized management of the sales process, and the improvement of the overall business operation efficiency and customer satisfaction**.



Customer management

- Resources are scattered, and it is difficult to view the full picture
- Some resources are not being effectively exploited
- It is difficult to achieve multi-dimensional analysis and prediction
- It is difficult to manage differentially

Marketing process management

- There is a lack of a retrospective summary mechanism for the pre-sales development process
- It is impossible to form a complete closed-loop management of sales
- After-sales service only manages order after-sales service and returns, and there is no complete customer complaint handling mechanism

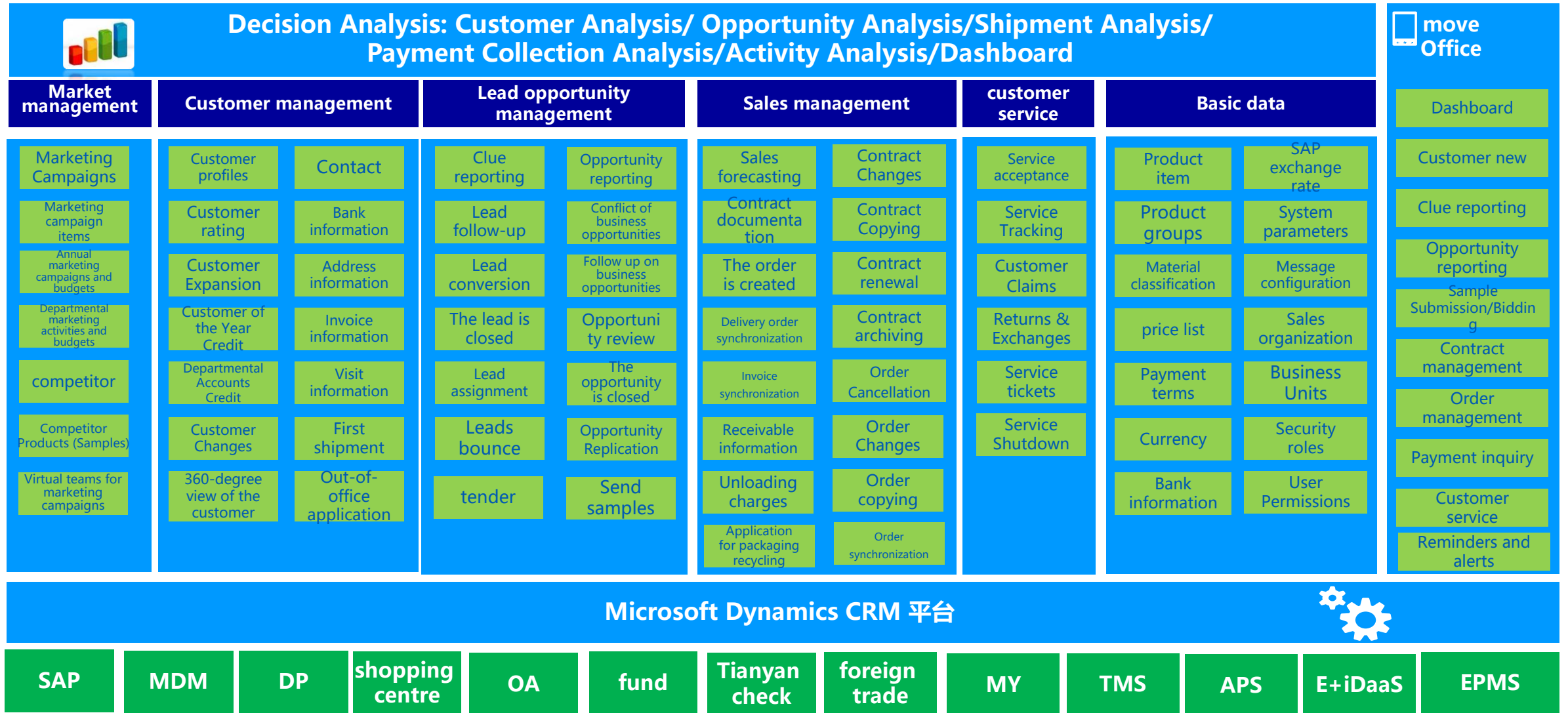
Sales team management

- Lack of effective goal, plan management and implementation process monitoring
- Lack of timely data and business support for the sales team
- Sales behavior and reporting are done by phone and email

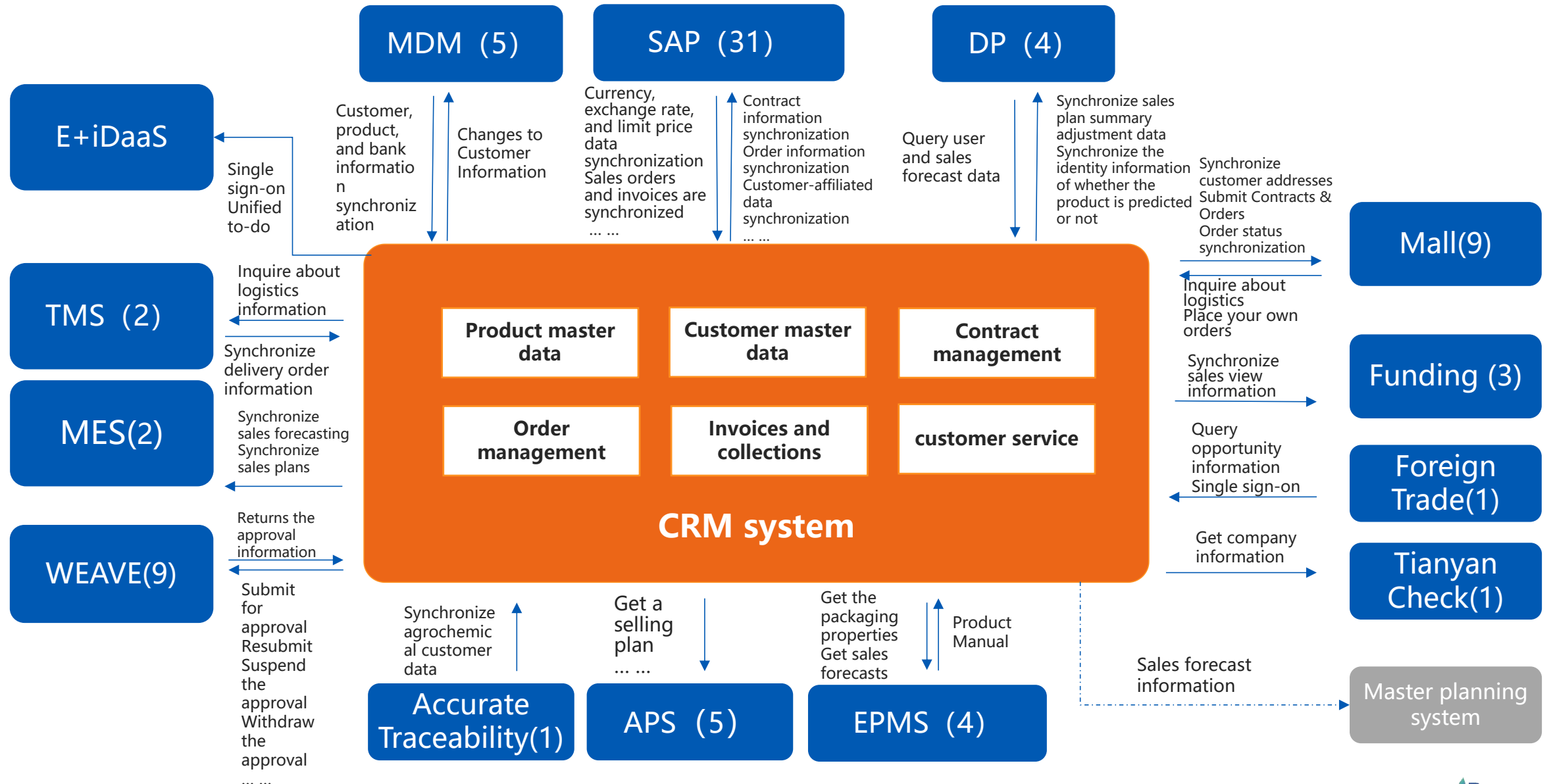
Business process architecture

Market management		Strategic selling	Sales Operations				Customer lifecycle management		
Campaign management	Lead management	Opportunity management	Contract orders and Sales forecasting	Compliance synergy	Financial synergy	Service management	Information management	Access and classification Hierarchical management	Contribution management
BP-MM-01/1 Marketing campaign planning and the budget process - annual - There is a centralized promoter	BP-SM-01/1 Lead Creation Process- Lead creation artificial Non-lead business follow-up	BP-SM-04 Opportunity follow-up process	BP-OM-01 Contract creation, change and the renewal process	BP-OF-01 Scheduling collaboration process	BP-FS-01 Collaborative credit management process	BP-CS-01 Service & Customer Complaint Process	BP-AM-01 Customer registration and profile information creation process	BP-AM-02 Customer onboarding and classification grading processes	BP-AM-05 Customer Contribution Management Process
BP-MM-01/2 Marketing campaign planning and the budget process - annual - No centralized promoter	BP-SM-01/2 Lead Creation Process- Lead creation artificial Lead business follow-up	BP-SM-05 Supplier onboarding qualification document creation and change process	BP-OM-02 Sales order creation, change, and termination management processes	BP-OF-02 Inbound to order matching Collaborative processes	BP-FS-02 Warranty Synergy Process	BP-CS-03 Return and Exchange Process		BP-AM-03 Customer information maintenance process	BP-AM-06 Customer contributions improve the execution of goals, strategies, and action plans
BP-MM-02 Marketing campaign planning and Budgeting process - On demand or on a case-by-case basis	BP-SM-02/1 Lead Dispatch Process- Lead creation artificial Non-lead business follow-up	BP-SM-06 Supplier onboarding process	BP-OM-03 Sales forecast-to-plan management process	BP-OF-03 Consolidation, shipping, and transport-to-receipt collaborative processes	BP-FS-03 Reconcile invoicing, receivables, and receivables overdue collaborative processes	BP-CS-02 Customer Claims Process		BP-AM-04 Customer expansion process	
BP-MM-03 Campaign execution process	BP-SM-02/2 Lead Dispatch Process- Lead creation artificial Lead business follow-up	BP-SM-07 Sample delivery process			BP-FS-04 Customer benefit management process				
	BP-SM-03 Customer call process	BP-SM-08 Collaborative process for new product development							
		BP-SM-09 Bidding process							

System functional architecture

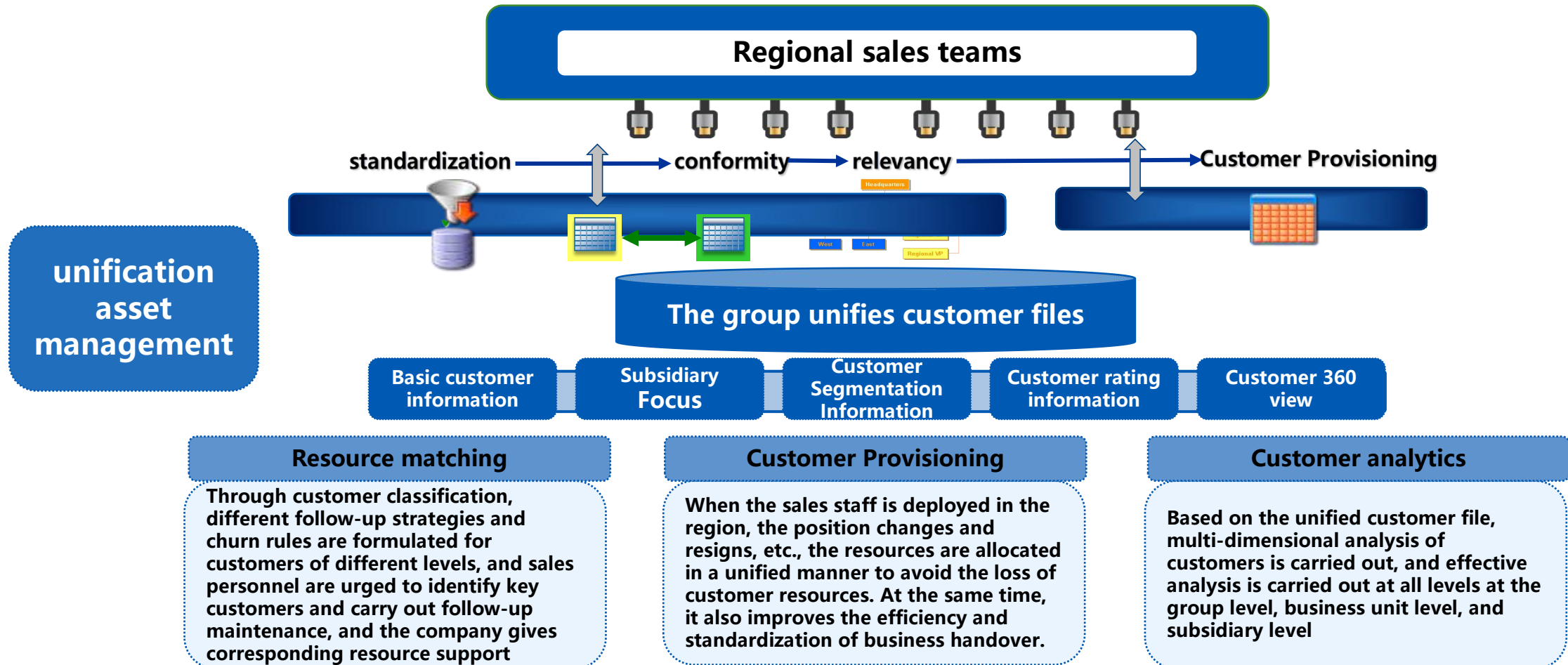


System integration architecture

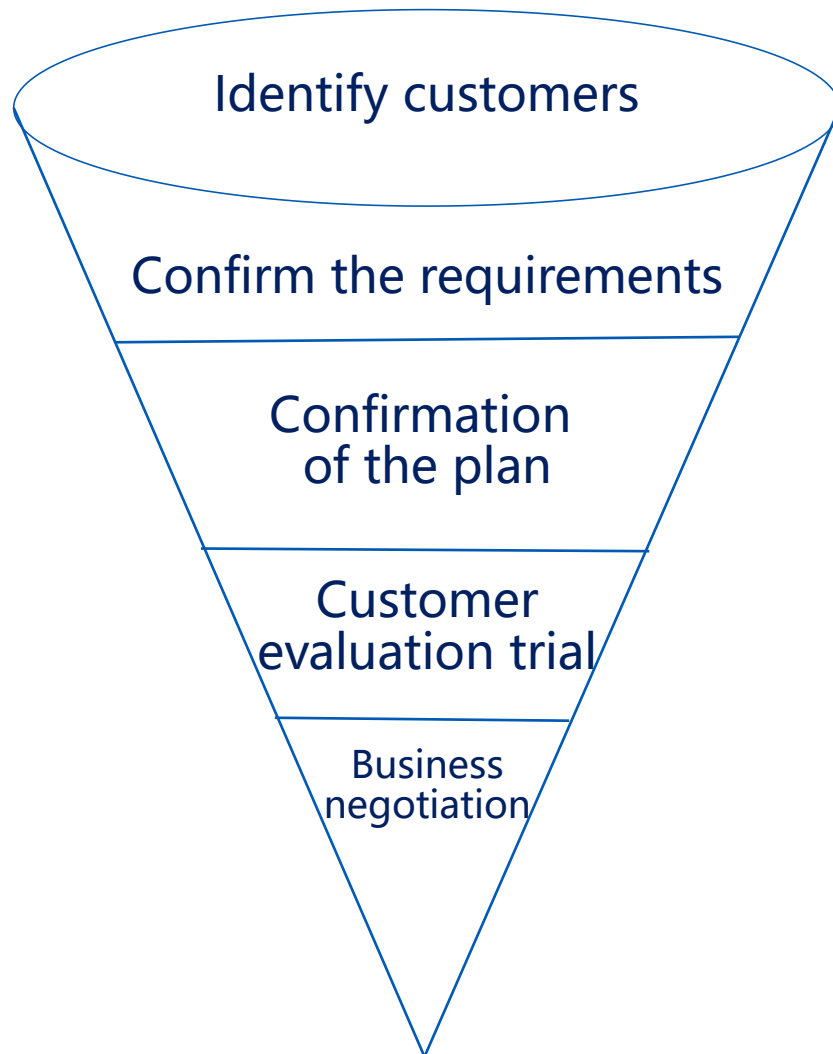


1. Customer capitalization: unify the group's customer resources, refine management, and enhance customer value

At present, the customers are scattered in the hands of various salesmen, and the company has no detailed customer file management. Personnel are frequently transferred, the handover process is carried out offline, and the identification of customers, salesmen, and business data is not clear, resulting in resource loss and low data utilization. Through the unified archiving of customers, the unified management of customer resources, unified analysis, and unified distribution, a three-dimensional management application of customer resources is formed.



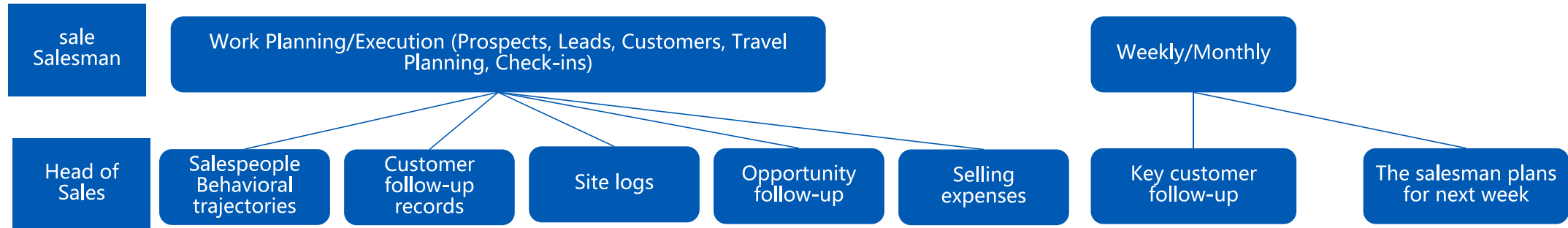
2. Sales standardization: standardize the structure, refine the sales process, and improve the order conversion



Funnel stage	Confirm the requirements	Confirmation of the plan	Customer evaluation trial	Business negotiations
Mission-critical	<ul style="list-style-type: none"> ✓ The name of the customer ✓ The name of the sales process ✓ The name of the opportunity ✓ Estimated closing date ✓ Customer demand (kg) ✓ Our estimated purchase volume (kg) ✓ Market price (RMB/kg) ✓ The product line to which it belongs ✓ Customer business problems and needs ✓ Identify competitors ✓ Sources of opportunity ✓ Opportunity Category ✓ Opportunity dimension ✓ Markets & Applications ✓ Target product features ✓ Customer procurement power ✓ Timing expectations ✓ Certification Requirements 	<ul style="list-style-type: none"> ✓ Target product viscosity (liquid glue, sealant, base product) ✓ Target product components (liquid glues, sealants) ✓ Appearance, volatile content, density, solid content of target product (liquid glue) ✓ Curing (surface drying, detackification, temperature, time, operating time) (sealant) ✓ TARGET PRODUCT HARDNESS (SHORE A) (RUBBER COMPOUNDS, LIQUID RUBBERS) ✓ Target product mix ratio (liquid glue) ✓ Mechanical, electrical, thermal, and optical performance requirements of the target product ✓ The customer applies the process 	<ul style="list-style-type: none"> ✓ The customer applies the process ✓ Identify competitors solution 	<ul style="list-style-type: none"> ✓ Identify competitors ✓ Suggested product price (RMB/kg) ✓ Need support ✓ Opportunity dimension
Key synergies		Sample requirements New product development		Quotation support

3. The sales team is empowered, and the system provides insight into the behavior of sales personnel and provides coaching support

Timely feedback on the daily work of sales staff, timely response by sales supervisors, and improvement of the standardization of the sales process and communication efficiency. The supervisor grasps the salesman's customer development process and sales process, reasonably allocates the company's resources and gives corresponding help in a timely manner, so as to improve the success rate of customer development and customer survival.

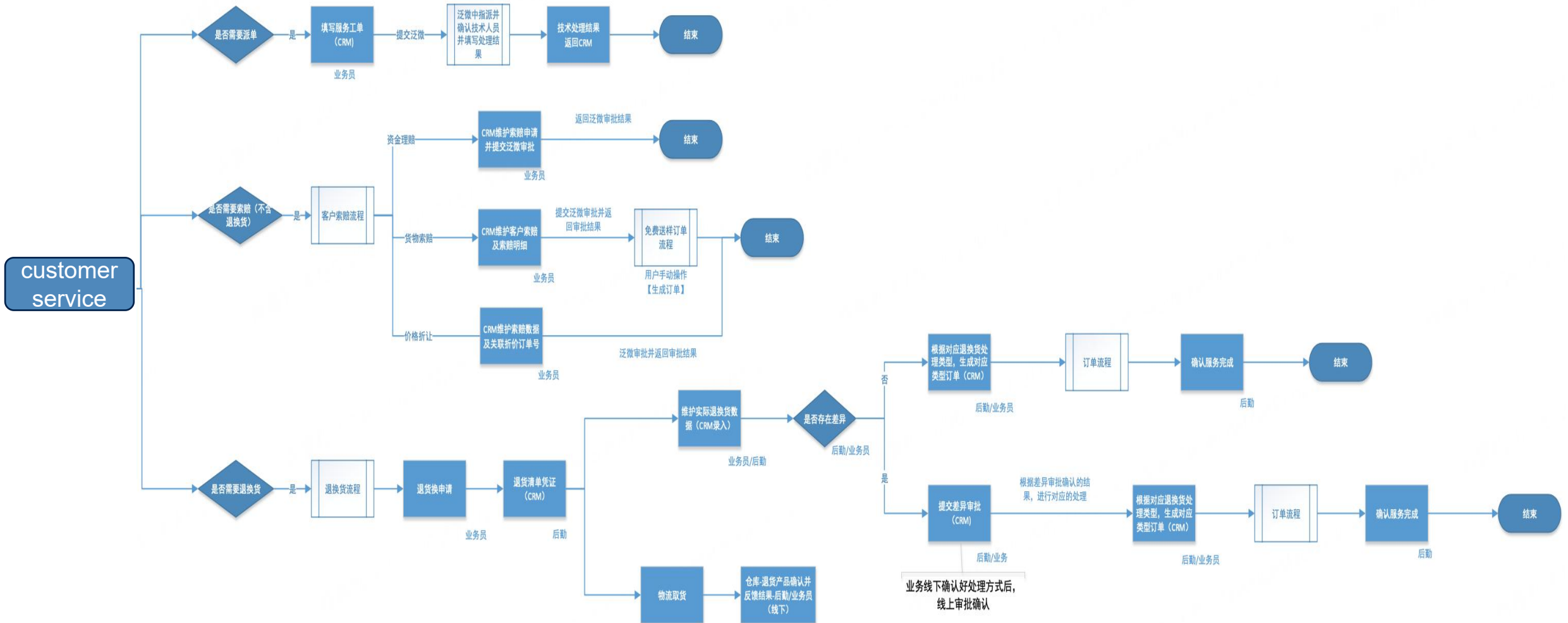


Through the salesman filling in the work plan and records, the system sorts and summarizes the information for the supervisor to understand the daily work of the salesman in multi-dimensional and multi-form data, and at the same time reduce the daily maintenance workload of the salesman.



4. customer ITR online closed-loop, efficient collaboration, ensure timely processing, and improve satisfaction

Internal handling of customer complaints, and closed-loop online processing of the whole process, greatly improve the efficiency of internal collaboration and improve customer satisfaction



5. Data-driven decision-making, and construct analytical indicators that are stitched with the system process

By product line, by designated product, by business department, by region, by channel/customer, by sales team, by salesman, real-time, monthly, quarterly, yearly, cumulatively

编号	流程	分析主题	分析指标	单位	计算方式	看板层级	阶段一 指标属性	阶段一 指标类型	阶段二 指标属性	阶段二 指标类型	时间维度	优先级	考核周期	视角维度	数据来源	系统
1	营销活动管理	营销活动完成度	营销活动完成率	%	已完成营销活动数/年度计划完成数×100%	管理层、运营层	运营监测	CPI	运营监测	CPI	实时	1		按产品线, 按指定业务, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按活动类型	年度计划数、一事一议数和实际完成数	CRM
2	营销活动管理	营销活动经济性	营销活动年度预算节降	%	实际营销活动支出金额/年度预算金额×100%	战略层、管理层、运营层	管理监测	CPI	运营考核	KPI	实时	1	年度	按产品线, 按指定业务, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按活动类型	年度计划预算、过程调整预算和实际支出预算	CRM
3	营销活动管理	营销活动有效性	营销活动线索数达成率	%	通过营销活动已获取线索数/年度计划获取线索数×100%	运营层	运营监测	CPI	运营监测	CPI	实时	2		按产品线, 按指定业务, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按活动类型	年度计划规划均获取线索数、营销活动产生线索数	CRM
4	营销活动管理	营销活动有效性	营销活动线索金额达成率	%	通过营销活动已获取线索金额/年度计划获取线索金额×100%	管理层、运营层	运营监测	CPI	运营监测	CPI	实时	2		按产品线, 按指定业务, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按活动类型	年度计划规划的获取线索金额、营销活动产生线索金额	CRM
5	营销活动管理	营销活动有效性	营销活动回报率	倍数	通过营销活动已获取线索金额/已支出预算	战略层、管理层、运营层	管理监测	CPI	运营考核	KPI	实时	1	年度	按产品线, 按指定业务, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按活动类型	营销活动产生线索金额、实际活动费用支出	CRM
6	线索管理	线索管理效率	线索数	数量	线索条数	运营层	运营监测	CPI	运营监测	CPI	实时	1		按产品线, 按指定业务, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按活动类型	线索条数	CRM
编号	流程	分析主题	分析指标	单位	计算方式	看板层级	阶段一 指标属性	阶段一 指标类型	阶段二 指标属性	阶段二 指标类型	时间维度	优先级	考核周期	视角维度	数据来源	系统
31	商机管理	商机管理有效性	赢单率	%	已赢单商机数/已分配商机数×100%	管理层、运营层	运营考核	KPI	运营考核	KPI	实时	1	月度	按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员	已赢单商机数	CRM
32	商机管理	商机管理有效性	商机已赢单金额	金额	全部已赢单金额/对应的客户数	管理层、运营层	管理监测	CPI	管理监测	CPI	实时	1		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员	已赢单商机金额	CRM
33	商机管理	商机管理有效性	商机到合同或订单数量转化率	%	已转化为合同或订单的商机数量/已分配商机数×100%	战略层、管理层、运营层	管理监测	CPI	运营考核	KPI	实时	1	月度	按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员	按商机转化率率、按合同、订单数	CRM
34	商机管理	商机管理效率	商机到合同或订单平均转化时间	时间	商机到合同或订单平均转化天数	管理层、运营层	运营监测	CPI	运营监测	CPI	实时	2		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员	商机创建提交开始到合同或订单签署日金额回传	CRM
35	商机管理	价格管理合规	销售订单的毛利差额	金额	(本卡销售价格-单位成本-单位费用(返利+超宽运费))×销售订单产品数量	管理层、运营层	运营考核	KPI	运营考核	KPI	实时	1	月度	按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		SAP
					1.3.用土金商品以市场价格											
编号	流程	分析主题	分析指标	单位	计算方式	看板层级	阶段一 指标属性	阶段一 指标类型	阶段二 指标属性	阶段二 指标类型	时间维度	优先级	考核周期	视角维度	数据来源	系统
61	财务协同	营收达成率	营业收入金额	金额	已核算实收营业收入金额	战略层、管理层、运营层	经营目标	BOI	经营目标	BOI	实时	1	月度	按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员	核算实收单	SAP
62	财务协同	营收达成率	营业收入金额占比	%	指定部分营业收入/全部营业收入金额×100%	战略层、管理层、运营层	业务战略	BOI	业务战略	BOI	实时	1	月度	按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员	核算实收单	SAP
63	财务协同	营收达成率	营业收入金额完成率	%	已核算实收营业收入金额/目标营业收入×100%	战略层、管理层、运营层	经营目标	BOI	经营目标	BOI	实时	1	月度	按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员	核算实收单	SAP
64	财务协同	营收集中度	按营业收入集中度排序CR10, CR20	排序	依据营业收入占比排序	战略层、管理层、运营层	管理监测	CPI	管理监测	CPI	实时	1		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员	核算实收单	CRM
65	财务协同	毛利达成率	毛利金额	金额	已核算实收毛利金额	战略层、管理层、运营层	经营目标	BOI	经营目标	BOI	实时	1	月度	按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员	核算实收单	SAP
编号	流程	分析主题	分析指标	单位	计算方式	看板层级	阶段一 指标属性	阶段一 指标类型	阶段二 指标属性	阶段二 指标类型	时间维度	优先级	考核周期	视角维度	数据来源	系统
91	渠道管理	交货有效性	涉及退货的订单数	个	涉及退货的订单数	运营层	运营监测	CPI	运营监测	CPI	实时	2		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
92	渠道管理	交货有效性	涉及退货的订单数占比	%	涉及退货的订单数/销售订单数量×100%	运营层	运营监测	CPI	运营监测	CPI	实时	2		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
93	渠道管理	质量管控有效性	客诉导致的营收损失金额	金额	客诉导致的营收损失金额	战略层、管理层、运营层	管理监测	CPI	管理监测	CPI	实时	1		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
94	渠道管理	质量管控有效性	客诉导致的营收损失比例	%	客诉导致的营收损失金额/全部营收×100%	管理层、运营层	管理监测	CPI	运营监测	CPI	实时	1		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
95	渠道管理	索赔有效性	索赔单数	个	索赔单数	管理层、运营层	运营监测	CPI	运营监测	CPI	实时	1		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
96	渠道管理	索赔有效性	索赔金额	金额	索赔金额	管理层、运营层	运营监测	CPI	运营监测	CPI	实时	2		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
97	渠道管理	索赔有效性	已获赔金额	金额	已获赔金额	管理层、运营层	运营监测	CPI	运营监测	CPI	实时	1		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
98	渠道管理	索赔有效性	已获赔金额占比	%	已获赔金额/索赔金额×100%	管理层、运营层	运营考核	KPI	运营考核	KPI	实时	1	季度	按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
99	渠道管理	索赔有效性	已获赔金额/客诉导致的营收损失比例	%	已获赔金额/客诉导致的营收损失金额×100%	管理层、运营层	运营考核	KPI	运营考核	KPI	实时	1	月度	按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
100	渠道管理	收货及时性	及时收货情况	%	当日完成收货的订单数/当日收货的订单数×100%	运营层	运营监测	CPI	运营监测	CPI	实时	2		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		SAP
101	销售预测管理	销售预测准确性	销售预测准确率	金额	销售金额/需求×未执行合同总额+未执行订单金额	战略层、管理层、运营层	管理监测	CPI	运营监测	CPI	月度	1		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
102	销售预测管理	销售预测准确性	销售预测准确率	%	(销售金额/需求×未执行合同总额+未执行订单金额)/销售预测准确率×100%	战略层、管理层、运营层	管理监测	CPI	运营监测	CPI	月度	2		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
103	销售预测管理	销售预测及时性	及时收货情况	%	及时收货的订单数/销售预测准确率×100%	管理层、运营层	运营监测	CPI	运营监测	CPI	月度	1		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
104	销售预测管理	销售预测准确性	销售预测准确率	%	已收款金额/预测应收款×100%	管理层、运营层	运营监测	CPI	运营监测	CPI	月度	2		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		SAP
105	销售预测管理	销售预测准确性	销售预测准确率	%	销售订单金额/计划销量×100%	管理层、运营层	运营考核	KPI	运营考核	KPI	月度	1	月度	按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
106	团队管理	销售达成率	出货天数	天	≥180天	管理层、运营层	运营监测	CPI	运营监测	CPI	实时	2		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
107	客户生命周期管理	客户信息首次正确	客户数据维护准确率	%	客户档案信息创建或变更后通过审批客户数/客户档案信息未通过审批客户数×100%	运营层	运营监测	CPI	运营监测	CPI	实时	1		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
108	客户生命周期管理	客户信息首次正确	客户信息首次完成度	%	客户信息首次正确/客户总数×100%	管理层、运营层	运营监测	CPI	运营监测	CPI	实时	1		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
109	客户生命周期管理	客户满意度	客户满意度	分	过去6个月有销售订单的活跃客户数/全部客户数×100%	管理层、运营层	运营监测	CPI	运营监测	CPI	实时	2		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
110	客户生命周期管理	客户满意度	客户开发数量	数量	首次下标准+销售+代销订单数	管理层、运营层	运营监测	CPI	运营监测	CPI	实时	2		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
111	客户生命周期管理	客户满意度	客户流失率	天	(2年内成交的流失客户数/年度全部已准入客户数)×100%	管理层、运营层	运营监测	CPI	运营监测	CPI	实时	1		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
112	客户生命周期管理	客户满意度	年度行业标杆客户销量(按客户分类分)	数量	行业标杆客户销售订单销量	战略层、管理层、运营层	运营考核	KPI	运营考核	KPI	实时	1	年度	按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
113	客户生命周期管理	客户满意度	年度行业标杆客户销售数(按客户分类分)	数量	年度行业标杆客户销售数	战略层、管理层、运营层	运营考核	KPI	运营考核	KPI	实时	1	年度	按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
114	客户生命周期管理	客户满意度	年度行业标杆客户营收(按客户分类分)	数量	年度行业标杆客户已核算实收金额	战略层、管理层、运营层	运营考核	KPI	运营考核	KPI	实时	1	年度	按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		SAP
115	客户生命周期管理	客户满意度	年度行业标杆客户应收(按客户分类分)	数量	年度行业标杆客户应收金额	管理层、运营层	运营监测	CPI	运营监测	CPI	实时	1		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		SAP
116	客户生命周期管理	客户满意度	年度行业标杆客户逾期(按客户分类分)	数量	年度行业标杆客户逾期金额	管理层、运营层	运营考核	KPI	运营考核	KPI	实时	1	月度	按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		SAP
117	客户生命周期管理	客户满意度	年度行业标杆客户销量达成率(按客户分类分)	%	行业标杆客户销售订单销量/全部销售订单销量	战略层、管理层、运营层	运营考核	KPI	运营考核	KPI	实时	1	年度	按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
118	客户生命周期管理	客户满意度	年度行业标杆客户销售数达成率(按客户分类分)	%	行业标杆客户销售数/全部销售订单数	战略层、管理层、运营层	运营考核	KPI	运营考核	KPI	实时	1	年度	按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
119	客户生命周期管理	客户满意度	年度行业标杆客户营收达成率(按客户分类分)	%	行业标杆客户已核算实收金额	战略层、管理层、运营层	运营考核	KPI	运营考核	KPI	实时	1	年度	按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		SAP
120	客户生命周期管理	客户满意度	年度行业标杆客户应收达成率(按客户分类分)	%	行业标杆客户应收金额	管理层、运营层	运营监测	CPI	运营监测	CPI	实时	1		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		SAP
121	客户生命周期管理	客户满意度	年度行业标杆客户逾期率(按客户分类分)	%	行业标杆客户的逾期金额	管理层、运营层	运营考核	KPI	运营考核	KPI	实时	1	月度	按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		SAP
122	客户生命周期管理	客户管理有效性	客户管理改善行动导致销量提升	%	相关管理改善行动导致销量提升/该客户总销量×100%	战略层、管理层、运营层	运营改善	CPI	运营改善	CPI	实时	1		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
123	客户生命周期管理	客户管理有效性	客户管理改善行动导致销售数提升	数量	相关管理改善行动导致销售数提升/该客户销售数×100%	战略层、管理层、运营层	运营改善	CPI	运营改善	CPI	实时	1		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
124	客户生命周期管理	客户管理有效性	客户管理改善行动导致营收提升	金额	相关管理改善行动导致营收提升/该客户营收×100%	战略层、管理层、运营层	运营改善	CPI	运营改善	CPI	实时	1		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM
125	客户生命周期管理	客户管理有效性	客户管理改善行动导致逾期下降天数	天数	改善行动前逾期天数-改善行动后逾期天数	战略层、管理层、运营层	运营改善	CPI	运营改善	CPI	实时	1		按产品线, 按指定产品, 按事业部, 按区域, 按渠道/客户, 按销售团队, 按业务员		CRM



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