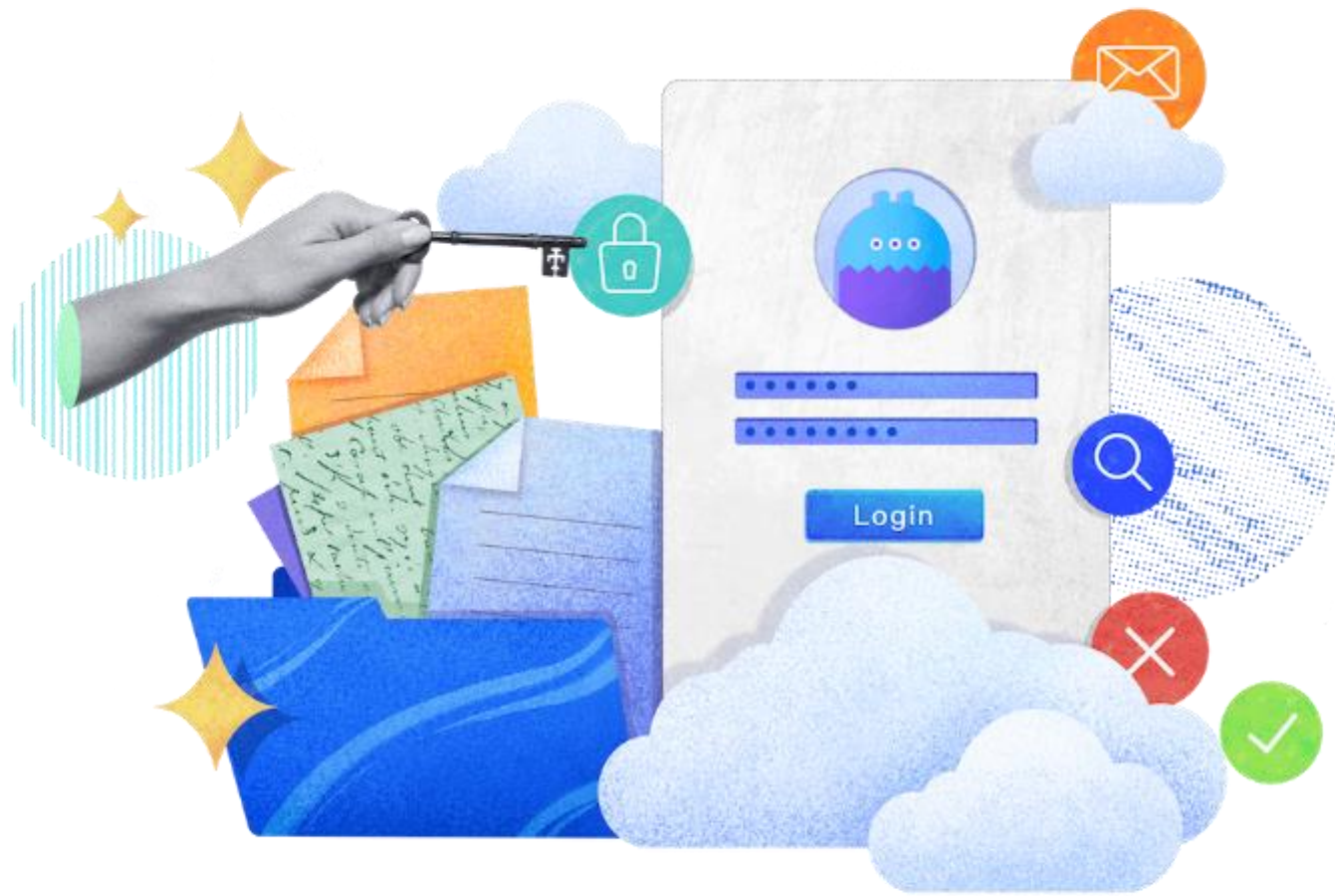# VITAL CRM

Boosting B2B Performance:

3-in-1 Management Platform

Marketing, Sales & Customer Services

VITAL CRM

- **Introduction of Vital Cloud Services**

- **Case Sharing**

- **Features of Vital CRM**

- **Vital CRM Functions**

- **Benefits**

GSS 叡揚資訊
Galaxy Software Services

Company

1987	Founded
2020.12	Listed on TPEx
Capital	Around NT$ 300 Million
Biz Scope	Taiwan, China, Japan, Southeast Asia

Recognition

ISO 9001 SGS	ISO/IEC 27001 SGS	CNS 27001 SGS	ISO 27018 SGS	CMMIDEV/3	CNS 15190 軟體能力成熟度
Since 1998	Since 2013	Since 2013	Since 2021	Since 2007	Since 2013

Employee

800+ Employees

> 39 employees certified to ISO/IEC27001: 2013 Systems Auditor/ Lead Auditor
> 26 employees certified to AZ-900: Microsoft Azure Fundamentals
> **21 employees certified to ISO 14064-1 Lead Auditor**

High Market Share in Specific Industries

GSS 叡揚資訊
Galaxy Software Services

The Executive Yuan & its Ministries & Agencies

National Development Council, Environmental Protection Administration (EPA), Ministry of Economic Affairs (MOEA), etc.

97%

County and City Governments

Taipei City, New Taipei City, Yilan County, Tainan City, etc.

82%

Medical Center

National Taiwan University Hospital, Cheng Kung University Hospital, Taichung Veterans General Hospital, etc.
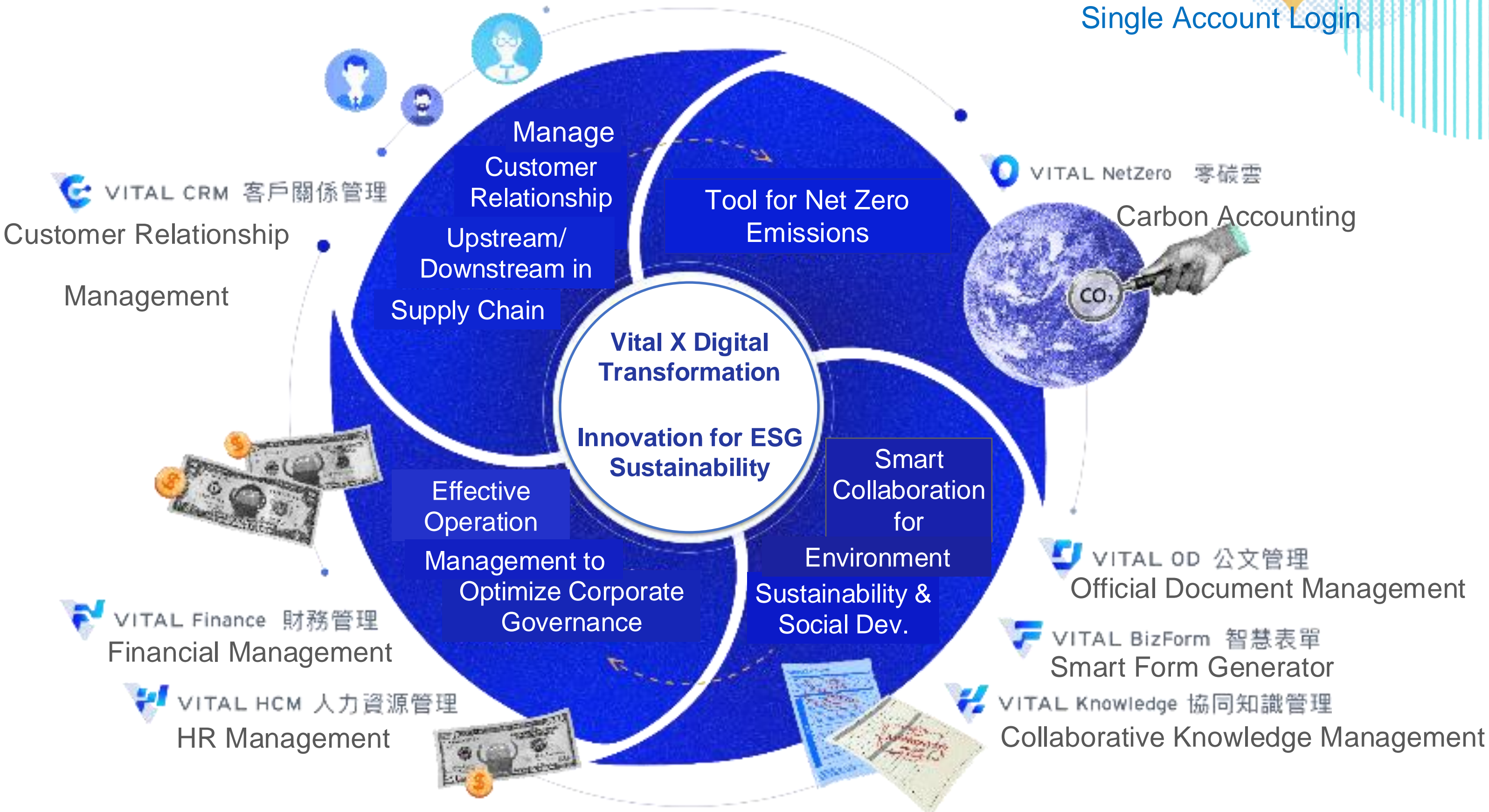
95%

Bank

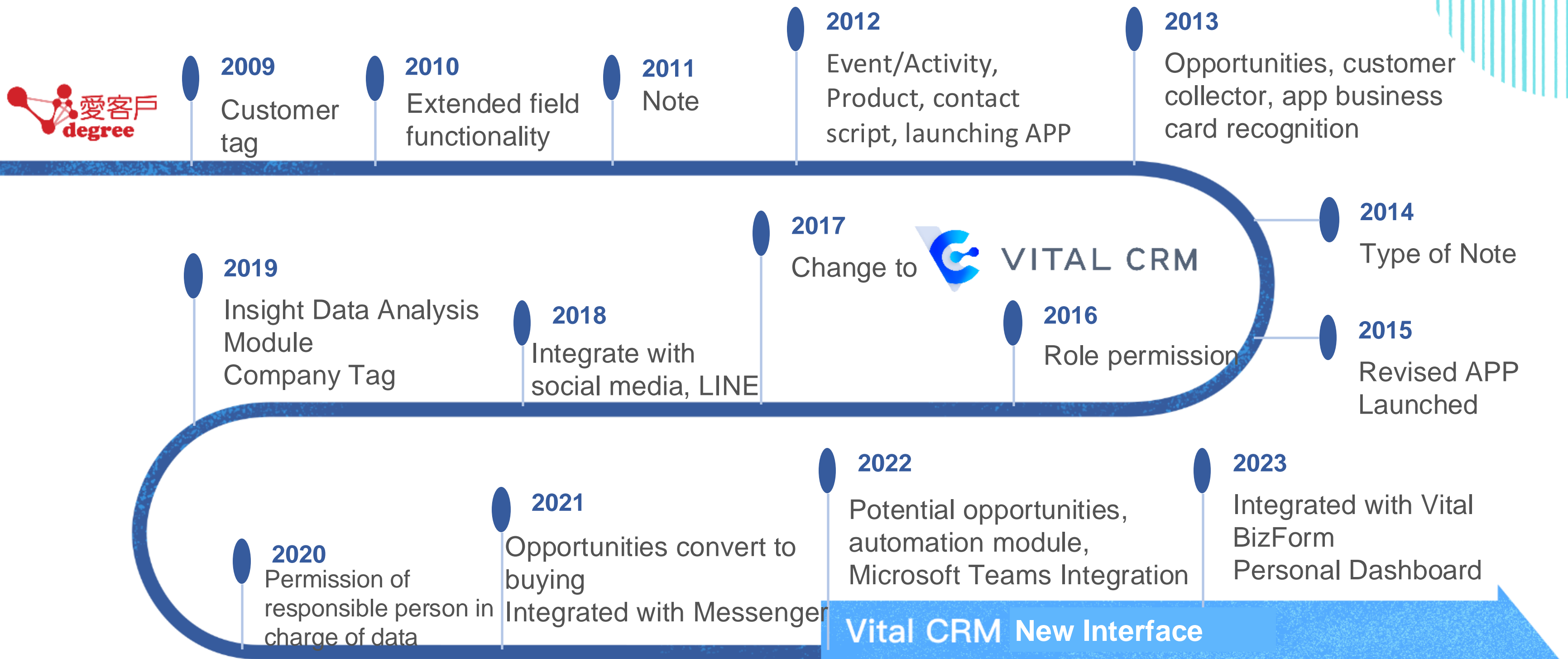**Taipei Fubon Bank, Cathay United Bank, O-Bank**

97%

Digital Tools for Enterprises

Unified UI/UX

Single Account Login

Manage Customer Relationship

Upstream/ Downstream in Supply Chain

Tool for Net Zero Emissions

VITAL CRM 客戶關係管理

Customer Relationship

Management

VITAL NetZero 零碳雲

Carbon Accounting

Vital X Digital Transformation

Innovation for ESG Sustainability

Effective Operation

Management to Optimize Corporate Governance

Smart Collaboration for Environment

Sustainability & Social Dev.

VITAL Finance 財務管理

Financial Management

VITAL HCM 人力資源管理

HR Management

VITAL OD 公文管理

Official Document Management

VITAL BizForm 智慧表單

Smart Form Generator

VITAL Knowledge 協同知識管理

Collaborative Knowledge Management

5

Agile Development - Over a **Hundred** **Versions** Released from 2009 to Present

VITAL CRM

2009 Customer tag

2010 Extended field functionality

2011 Note

2012 Event/Activity, Product, contact script, launching APP

2013 Opportunities, customer collector, app business card recognition

2014 Type of Note

2015 Revised APP Launched

2016 Role permission

2017 Change to **VITAL CRM**

2018 Integrate with social media, LINE

2019 Insight Data Analysis Module Company Tag

2020 Permission of responsible person in charge of data

2021 Opportunities convert to buying Integrated with Messenger

2022 Potential opportunities, automation module, Microsoft Teams Integration

2023 Integrated with Vital BizForm Personal Dashboard

Vital CRM New Interface

Engages Users to Improve
Always Provides Latest Version

6

Recognized in Taiwan & the World

VITAL CRM

The only CRM from Taiwan listed in Gartner's Vendor Guide 2017, 2018

Taiwan Excellence 2018

Awarded Merit in APICTA 2019

2,000+ Paid Enterprises

in different industries

VITAL CRM | Customer Map

Semiconductor Optoelectronic Manufacturing

TOPCO
Kingyoup
Lin Horn
T-Global
Su'scon
Yuhchang
Sodic

Retail Brands

[Food Retails]
Anyong Freshmart, Inc.
Jiu Zhen Nan Taiwan Pastry
Tan Hou Co., Ltd.
OKLAO Coffee Farms Co., Ltd.
Tenno Rice Enterprise Co., Ltd.
Saint Paul Baking Co., Ltd.
Cheese Duke
Kuang Ta Hsiang

[Health Food]
Nestlé Taiwan Limited
YOHOPOWER Co., Ltd.
DA YI BIOTECH & HEALTH FOOD CO., LTD.
KEI SEI KEN BIOTECHNOLOGY .
Reiliving Corporation
Balanstart.
Calmport Biotech
Alchemist Biotech.
Shaklee Taiwan.

[Goods]
New York Furniture Design Center
ORINGO
Ingeni (Fourest)
Orix
Sun and Moon Aroma Enterprise
Blueseeds
Canjune International
Kuai Shan Fang
PUHU Footwear
Smiling Elements International

Professional Service

TEN Life Health Technology
Nobel Medical Group
Tsai Ku HR Management
Century 21 Real Estate
Metropolitan Immigration Consulting Group
Digital Advertising
UDNFunLife
Han Lin Education Technologies
CLT Intellectual Property
Merica Manpower Resource
Youting Dental Clinic
Junqi Aesthetic Medicine
Home Therapy

Department Store/Exhibition/Theater

National Taichung Theater
GIS Group
OLILY Exhibition International
Intercon Convention Management
Global Town Business Center
The Lalu
The Riviera Hotel
China Times Publishing Company
Boulder Media Inc.
Junior Ding Baby & Mommy International
Liouguei Village

Computer/IT

Aurora Group
Far Eastern Electronic Toll Collection
GrandTech C.G. Systems
General Integration Technology
Dcard Taiwan
JKO FinTech
Books.com
Walk & See

Construction /Design/ Sales Agency

Chang Chun Construction
Skwentex International
Cheng Long Energy Technology
Pineapple International
AvisoTec
Zhuan-Yuan Engineering Consultants
GreenJump Sustainability

Trading

TRIAD International
Shih Lei Business
Chiao Kwang
Taikkiso
Shinn Nan World Trade
Da-Jin Lubricants
KM Developing Solutions
ACL Biomedical

Foundation / Association

ITRI College
Taipei Computer Association
Taiwan Silk & Filament Weaving Industrial Association
Chinese Association Leaders Union
Taiwan Business Leaders Club
Management Intelligence Sharing Association (MISA)
The Mustard Seed Mission
Child Welfare League Foundation

Other Manufacturing

[Chemical / Biotech Manufacturing]
Hopax Bio-Medical
Bionime
Far East Bio-Tec
Timing Pharmaceutical
Jheng Da Polymer Chemical Industrial
Ming Chyi Biotechnology
Pures Biotech

[Precision Industry]
Hu Lane Associate
Chan-Way Precision Industry
Chienfu-Tec

[Textile]
WidePlus International
Hop Lion Feather Works

[Others]
Strong Way Industrial
Spider Industrial

VITAL CRM

Case Sharing

T-global - Unified management for different sales units

Chan Way Precision - Coordination of production and sales in customized manufacturing

Established in 2003

Thermal Simulation Testing, Thermal Interface Materials, Heat Sinks, Heat Pipes,Vapor Chambers, Electromagnetic Wave Absorbing Materials, Thermoelectric Cooling Chips

Use Vital CRM + Insight, Vital Knowledge

Primary Customer Groups: famous Automotive, Electric Vehicle & 3C Brands

Awarded the 5th Dun & Bradstreet SME Elite Award in 2018; in 2016, received B Corporation (B Corp) certification.

Established locations in Taiwan, CN, US, UK and South Korea.

（Source of Photo：TechOrange）

T-global Technology is a model of practicing ESG principles, being one of the few companies in the country to have B Corporation certification and to be awarded as a Happy Enterprise

11

Why CRM?

VITAL CRM

> Different report formats from 6 units make it difficult to get the full picture of customers, increasing the complexity of business management.

Opportunities are hard to track and manage

Using LINE to discuss / report on opportunity progress makes it impossible to fully understand the case status.
Sales staff only record visit notes for supervisors after returning to the office, missing the golden period for decision-making on opportunities.

Customer data is scattered

Sales staff use Excel to manage customer lists, wasting time on searching and correcting information.

Service efficiency is not good

When personnel change, service gaps easily occur. ， Sales staff need to look up sales-related information while outside and cannot respond to customers in real-time. 。

T-global Technology's Chief Marketing Officer, Fan Gangyuan (photographed by TechOrange).

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How Vital CRM is used ?

Mobile Management

After visiting customers, records are written on mobile phones, allowing supervisors to provide immediate feedback. Customer service and performance tracking are not limited by time or space.

Tags in Note

Previously, sales staff recorded customer details on business cards. Now, they can tag customer statuses in Vital CRM, such as: likes outdoor activities, has children, etc., to get a full picture of the customer's background.

Statistic Insight

Enhances overall management efficiency.
Previously, a lot of time was spent preparing reports before meetings. Now, with insight analysis, strategies and actions can be quickly discussed, making meetings more focused.

Scale of Vital CRM Users
30 supervisors and sales staff
China: 7 people
Europe and America offices: 7 people
44 person in Total

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Benefits

VITAL CRM

Business Growth 50%

Faster decision-making; more precise customer services; quickly seizing new customers during the pandemic, achieving growth against the trend.

Lessen 55%

Administrative time for sales tasks e.g., generating performance reports, searching for customer service records.

Decrease errors by 80%

Save time to focus on providing excellent customer service Advance project progress

Weekly review and decide

From previously only being able to discuss last month's figures, to now being able to make decisions weekly.

Chan Way Group

- ✦ Founded: 1997
- ✦ Capital: 150 million
- ✦ Number of employees: 100
- ✦ Products: Precision molds for car parts and medical equip. (as an upstream supplier for major car makers. 70% of products are exported to Europe, US, and Japan)
- ✦ Digitalization + Intelligence: In 2017, introduced IoT and automation equipment, launched a smart factory, collected on-site data, and implemented information systems to establish digital processes.

Why Vital CRM + Insight ?

General Manager of Cheng Wei Precision Industry, Tsai Chih-Hsiung (photographed by TechOrange)

Assistant Manager of the Sales Department at Cheng Wei Precision, Lin Hsing-Chun (photographed by TechOrange)

Connect Sales and Production

By using Vital CRM Insight to analyze the current opportunity proportions, analyzing demand allows for early adjustment of factory capacity to ensure on-time delivery.

Highly Customized Manufacturing

Almost every order is designed, developed, and produced according to customer requirements. Therefore, clear customer communication history and always understanding specific customer needs are very important.

⚠️ The communication history with customers and business opportunities are scattered across emails and Excel, making it difficult to manage opportunities.

⚠️ Manually processing customer-related data requires a week to organize data and reports.

⚠️ The information that the boss and supervisors is not timely enough, making decision-making and effective management challenging.

⚠️ The sales team did not precisely get updated with the last customer demand changes before sending orders to the factory for production, often leading to significant operational losses.

Vital CRM Solution

Complete Customer Journey

Reduce losses from incorrect orders caused by erroneous information by thoroughly recording interaction histories.

Real-Time Opportunity Management

Decision-makers can instantly grasp business progress while utilizing insights and analyses to understand the current opportunity distribution (demand analysis for stamping and plastic molds). Since different production machines are required, they can allocate factory capacity in advance to ensure timely delivery to customers.

Enhance Service Capability and Customer Satisfaction

It used to take 1 week to organize meeting materials and report, but now they can focus on serving customers and exploring opportunities with fine-tuned services

Benefits

- **Real-time Management of Business Status & Opportunity Proportions for Optimal Production Scheduling**

- **Keep Customer Interaction Records to Reduce Opportunity Loss**

- **Save 60% of Time Spent on Data Organization for Sales**

- **Enhance Sales Service Capabilities**

- **Maximize the Manpower of Sales Personnel**
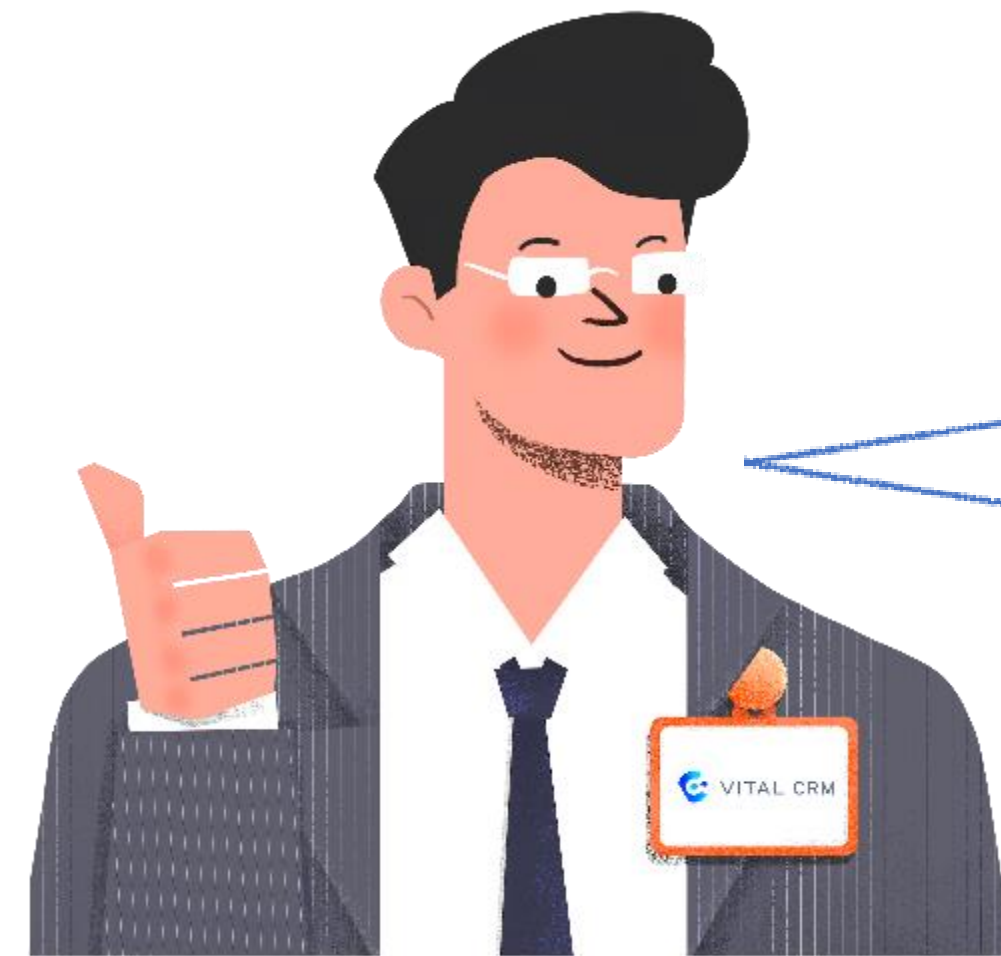
Challenges in Marketing & Customer Service

Underestimating marketing & sales will lead to a company's downfall!
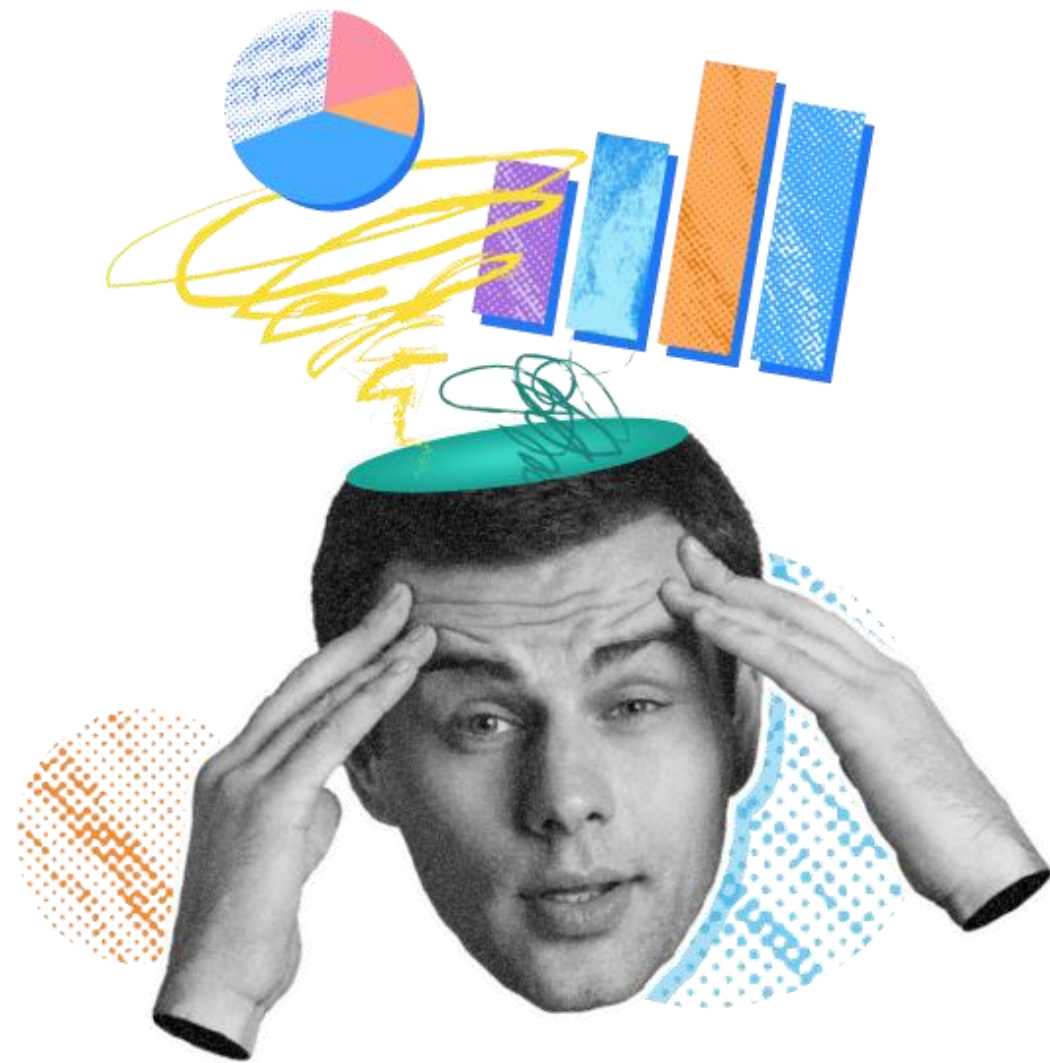
Many general managers with a technical background focus solely on technology, believing that good products will bring customers naturally---a very misguided idea. There are also technology companies that but technology before sales and marketing, thinking that technology is the most important factor. However, without salespeople, you simply won't have business or make a profit; the company won't survive at all.

Good products will bring customers naturally？

✖ Wrong

Common Mistake of General Mangers：
Technology is the only important matter

from CommonWealth Magazine, October 4, 2019: Mr. Morris Chang's Speech at Tsinghua University: Learning for General Managers.

Marketing Team/ Supervisors

1. **Spend a lot of time** organizing list obtained in the exhibits and **unable to know** the progress of business contacts

2. The **benefits** of marketing activities are difficult to report to the management with **statistics**.

3. **The marketing team can not effectively use the customer information** since all information is scattered accross ERP systems or in the heads of sales.

4. Uncertainty about where customers come from **makes it hard to allocate the advertising budget** ?

Sales Team/ Supervisors

1. When a salesperson leaves **without a proper handover**, how can the new person handle clients?

2. When trying to inquire about customer information outside, having to call the sales assistant is **too slow**!

3. Using LINE to ask about case details leads to scattered messages, making **it difficult to consolidate case progress**.

4. Manually compiling reports results in data that is **not timely enough**, making it **impossible to predict performance**

Service Personnel

1. Poor handover of sales leads to problems needing to re-inquire with customers, causing frustration due to **service gaps**.

2. There is **no platform for recording and tracking customer needs**; being too busy to step away yet having no one to assist!

3. Customer issues are diverse; **how can we highlight the contribution of the department's work?**

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Solution Architecture Diagram

VITAL CRM

GSS CLOUD
Basic Service Integration
- ✦ Account Center - Single Sign-On
- ✦ Procurement Platform / Supply Installation Center Integration

External System Integration
- ✦ POS System
- ✦ E-commerce Platform
- ✦ Other Customer/Order System

Web Interface

App Interface
Not all functions are supported yet.
Download on the App Store
GET IT ON Google Play

API Module

Marketing
- Multi-dimensional customer grouping
- Event management/ Tracking
- Customized scripts
- Automated Marketing
- Mail/Message/ Line@ / FB Message

Sales
- Customer Notes**
- Contact Management
- Opportunity Management
- Quotation
- Order(Sales) Management

Services
- Customer Service Notes
- Task Management
- Social Conversational Customer Service
- Service Effectiveness Statistics

Analytics
- Consumption / Order Analysis
- Sales Forecasting
- Marketing Message Effectiveness
- RFM Analysis
- CLV Prediction
- Customer Profile Analysis

asic Customer Management Functions

Tag

Note

Customer Collectors

Customer Calendar (Work / Appointment)

Customer/Compa

VITAL CRM

Solution Features

$ Sales

VITAL CRM | Application Features in Sales

- ✓ Customer-Centric 360-Degree Information Integration

- ✓ User-Friendly Interface

- ✓ Unified Marketing, Sales, and Service Functions

- ✓ Quick Implementation and Cost-Effective

Old ales Report Management Model: Time-consuming, error-prone, and difficult to track

Salesman A

Saleswoman B

Saleswoman C

Salesman D

Sales Assistant
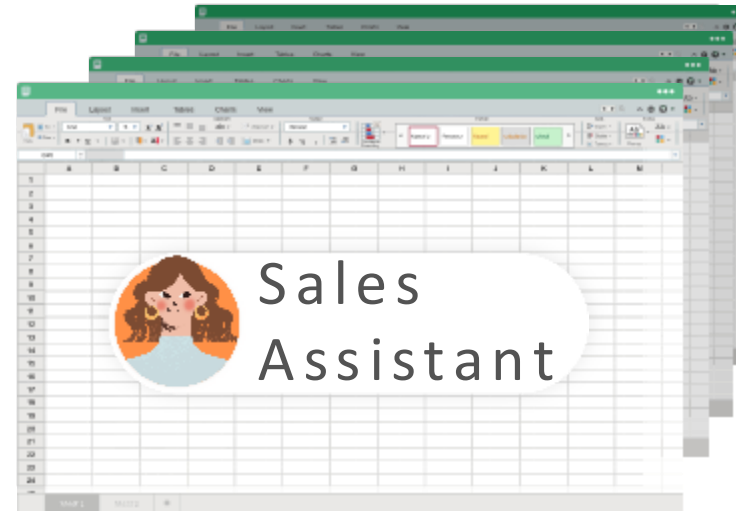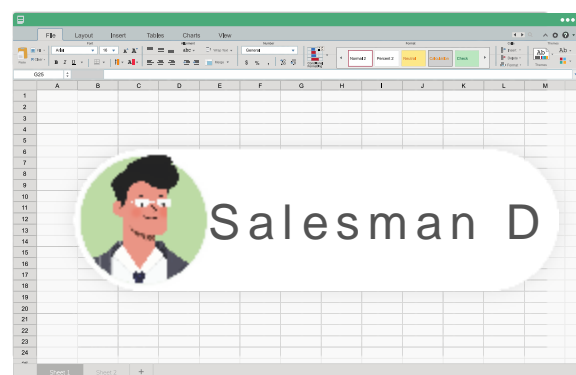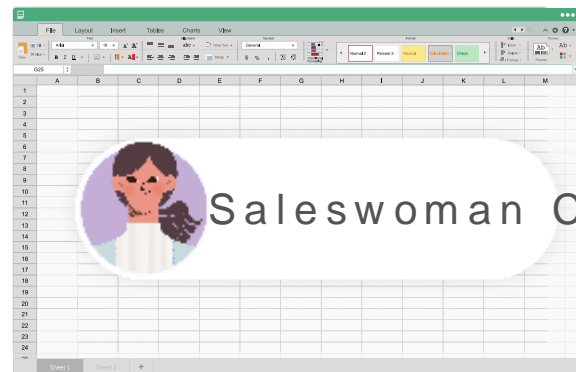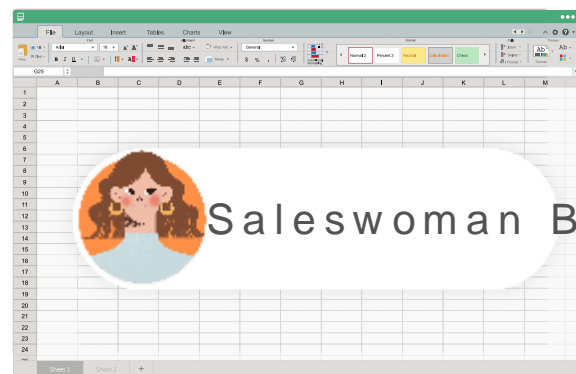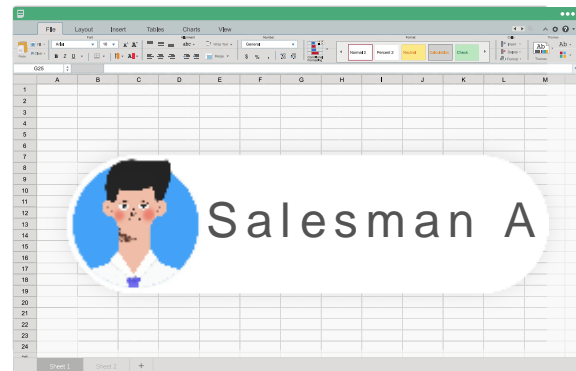
Manually Done Time-consuming, error-prone

Top Management
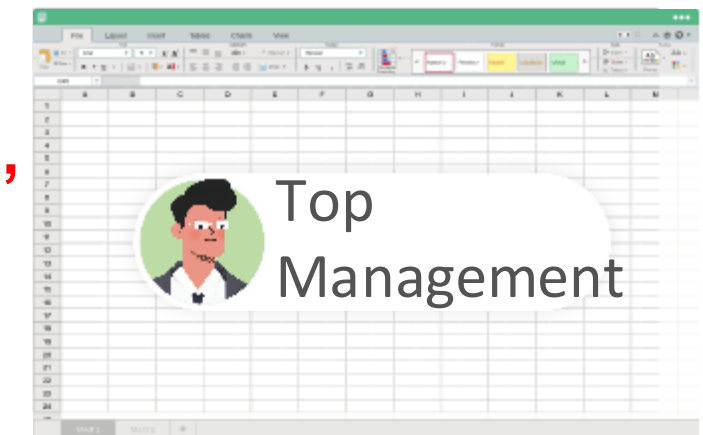
- It is time-consuming for assistants to manually track, compile and organize reports, making it prone to errors.

- Reports are compiled weekly or monthly, making it difficult to respond to the rapidly changing customer relationships and market conditions.

- Opportunities with different clients and sales are scattered across multiple Excel files, making it hard to have whole picture of the customer and increasing the complexity of sales management.

Ensures consistency in business processes and data quality

VITAL CRM

Social Media

Workshops

Product Web

Audio-Visual Materials

OnlineAdvertising

Partners

Exhibitions/Events

Marketing Automation

Seminars

Business Development

Networking Referrals

Establish Customer/ Contact Info

Potential Opportunities

Phone / Email

Note

To-do List

Meeting / Activity

A lot of data during business process

Business Opportunities

Orders

Data Analysis for Performance Tracking, and Future Forecasting

Insight Statistics Analysis Module

- **Business Activity Analysis**
- **Product Analysis**
- **Sales Cycle Analysis**
- **Opportunity Conversion Rate Analysis**
- **Sales Forecasting**
- **Performance Goals / Achievement Rate Analysis**
- **Order Analysis**
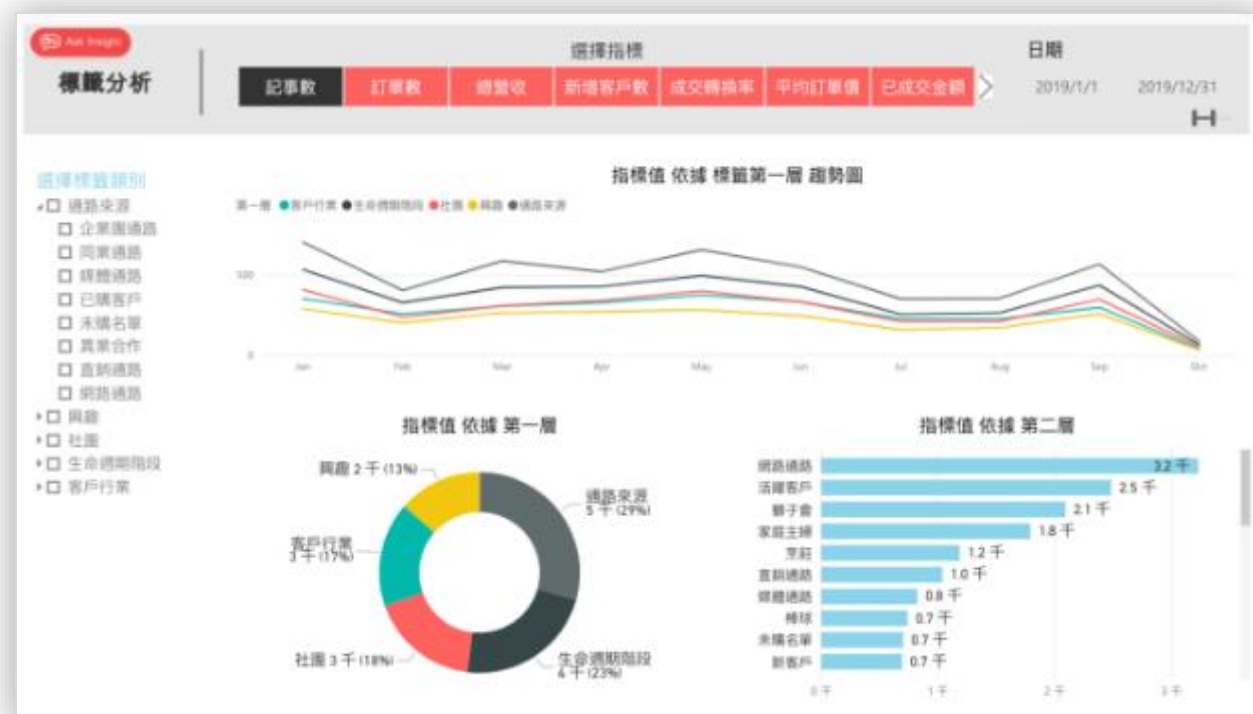
- **Interactive, visualized** ways to analyze CRM data

- **Calculate, Analyze and predict** the data collected in CRM

- **Find issues from the statistics** and provide effective measusres

Insight Module: 1-click analysis for faster decision-making

Integrated Database

Salesman A

Saleswoman B

Saleswoman C

Salesman D

Analyze

Decide

Forecast

- Customer relationship opportunities are uniformly input into a single system with data analysis presented directly, **allowing more time for business development.**
- Real-time updates of market data enable supervisors to provide immediate feedback **in response to market changes.**
- Accumulates the company's customer relationship data as an asset for decision-making, and **transforms market data into valuable insights.**。

29

5 Categories with 26 highly flexible analytical reports

VITAL CRM

Sales/Service Management

- Note Analysis
- Work Analysis
- User Management
- Potential Opportunity Management
- Opportunity Management
  1. Closed Case
  2. Open Opportunities
  3. Overview
  4. Opportunity Timeline management
- Performance Target Analysis

Customer Analysis

- Customer Profile Analysis
- Company Profile Analysis
- Tag Analysis

Sales Analysis

- Consumer Analysis
- Customer/Company RFM Analysis
- New/Existing Customer Consumption Analysis
- Repurchase Cycle Analysis
- Product Analysis

Other Analysis

- Customer Overview
- Data Quality Analysis
- Ask Insight
- Tag Cloud

Marketing Analysis

- Marketing Email Analysis
- Event Analysis
- LINE Friend Analysis
- Open Rate Analysis
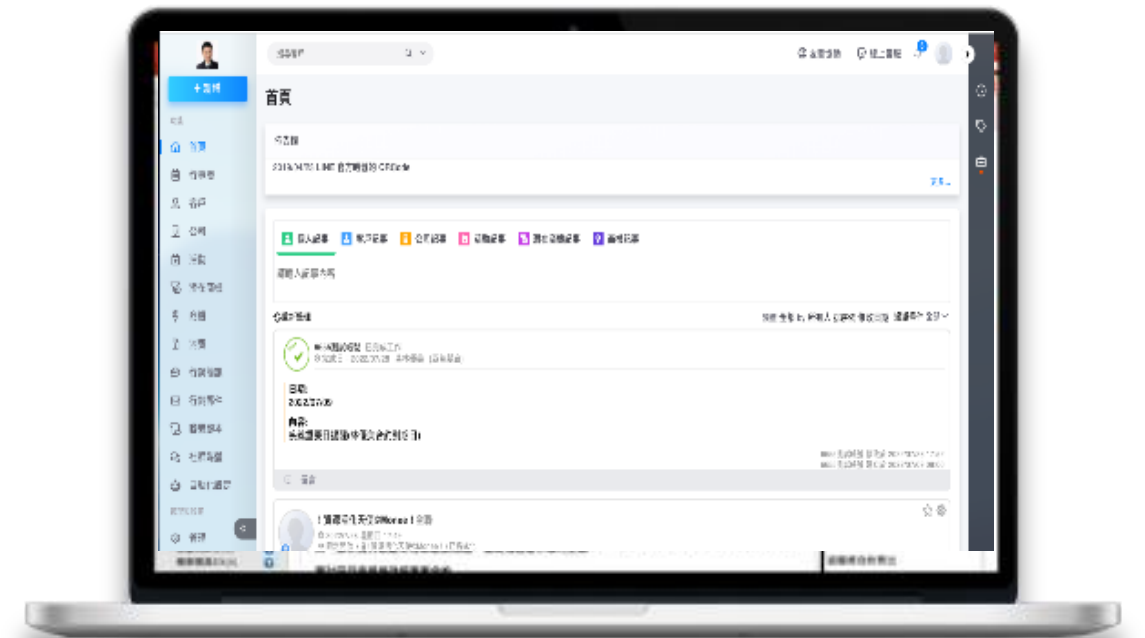
Personalized Dashboard: Efficient, Comprehensive

Customized Display Reports: Easily Get Comprehensive Data

VITAL CRM

Solution Features

Service

VITAL CRM
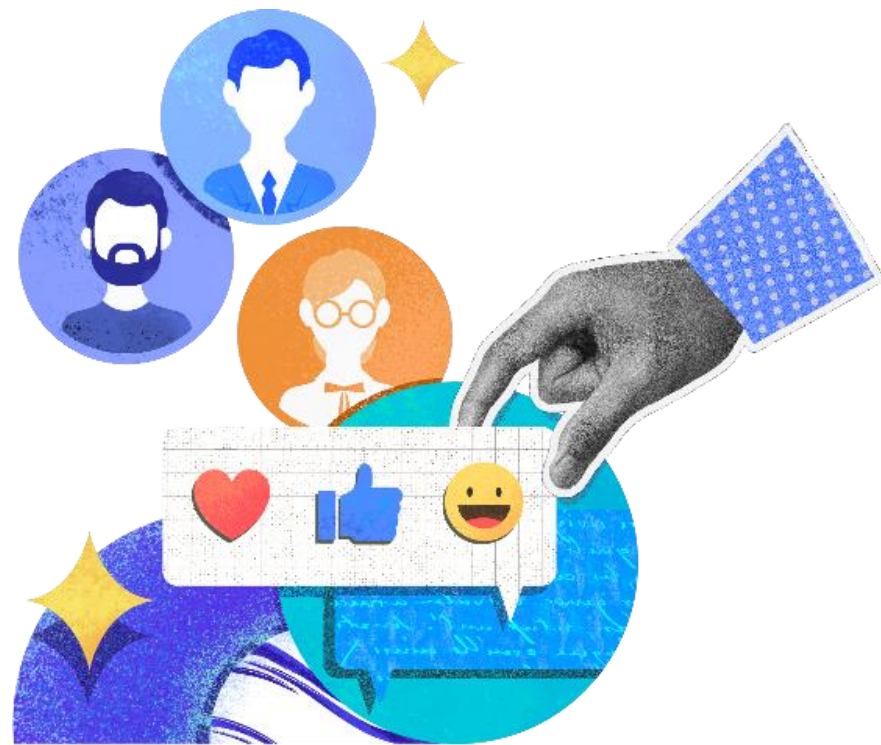
- ✓ More Satisfying Service Experiences

- ✓ Proactive + Automated Customer Services

- ✓ Clearer Pictures to Present the Performance in Service

A satisfied customer will share their positive experiences with 5 people.

However, an unsatisfied customer will share their negative experiences with at least 9 to 10 people, and 13% will spread it to more than 20 people.
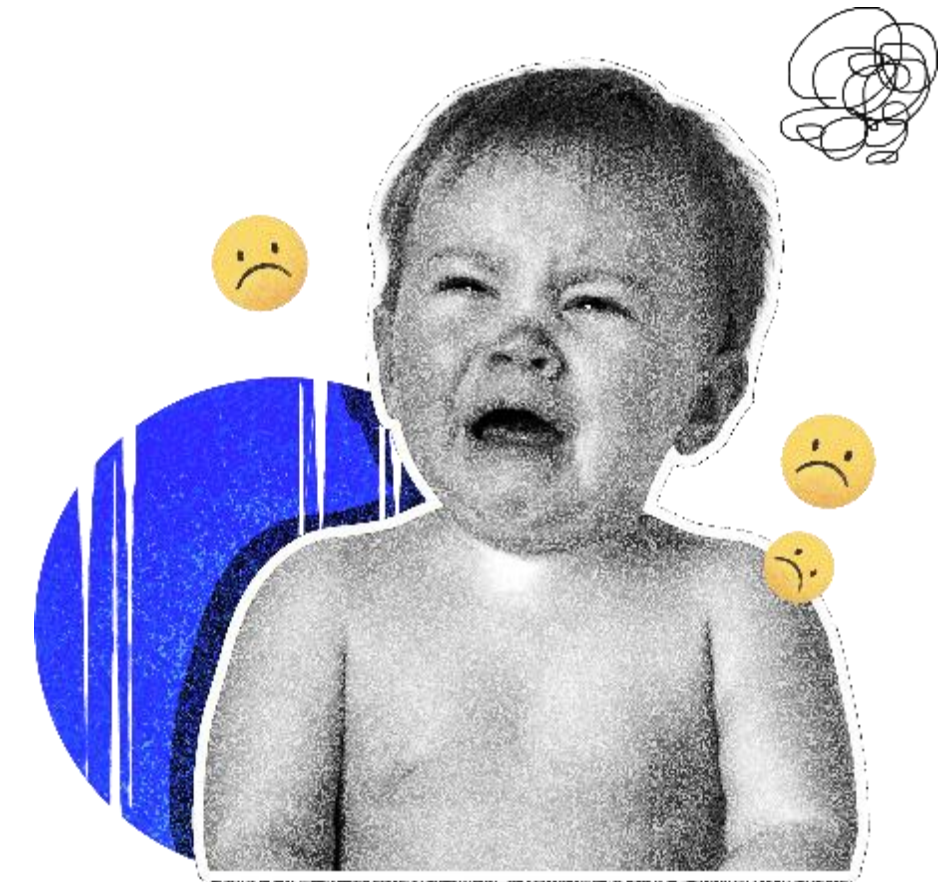
Hard to Collect After-Sales Data and Provide Real-Time Services

Customers buy products → Fill out warranty cards → Mail warranty cards → Register warranty info: Keep records → Match procurement records and warranty cards

Customers

Brands
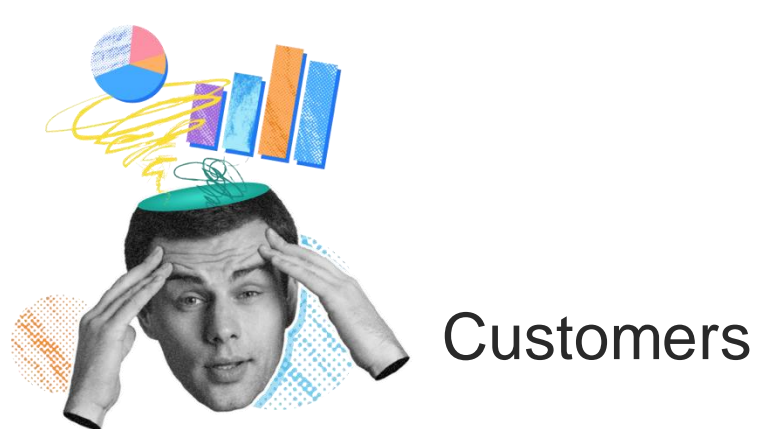
It is very troublesome to fill out the physical warranty card to mail it back!

What to do with the low recovery rate of warranty cards, incorrect or incomplete information, the risk of missing or incorrectly entering multiple entries at once, and how customers can know the status of their inquiries

Repair Process is Lengthy, Making It hard to Achieve Customer Satisfaction

Phone Feedback

Website Form

Email
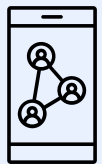
Social Media Conversation

Feedback from Salesperson

1. Provide basic info & purchase details, i.e. model, purchase location, and date.

2. Describe the issue

Check the record in paper or in EXCEL for warranty info

Dispatch Staff

Reply customer

Customer

Brand

⚠ Why do they keep asking the address provided last month for repair?
⚠ Repeat the unfixed issue again ?

⚠ How could I know the issue last time? I am so frustrated!
⚠ I have no idea why it took so long to fix. How should I reply the customer?

Quick Repairs + Efficient Responses Increase Customer Satisfaction

VITAL CRM

Personalized QR codes for users to scan w/o the need to re-enter purchase information

1 → Log in to register warranty

2 → Repair Notification

Receive cases

Dispatch

Repair

Reply

Satisfaction Survey

Dissatisfaction Management

Efficient Warranty Service Database

Survey

Management Report
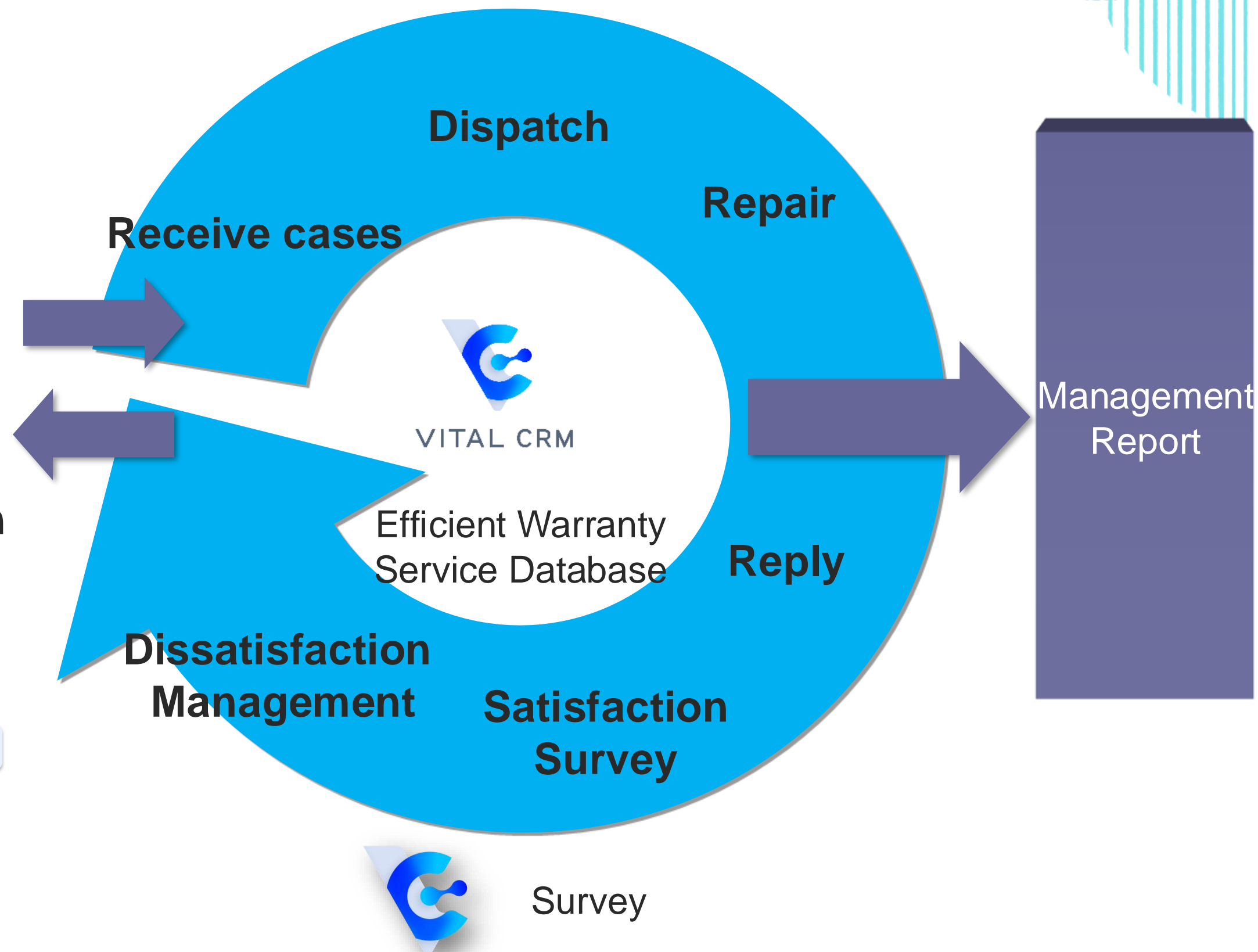
Contact Script: Personalized After-Sales Services

VITAL CRM

Day 1

Dear OOO,
Thank you for using our services. I am your service representative, Joy. If you need any assistance, feel free to contact me anytime !

1st Month

Dear OOO,
Have you been using the product smoothly? I would like to share the latest product features with you. Feel free to subscribe to our newsletter to learn more about application cases!

2nd Month

Dear OOO,
The mail is sent to remind you of regular maintenance. If you have any maintenance questions, please feel free to contact us. Our specialists are here to assist you!

3rd Month

Haven't you scheduled a maintenance appointment yet? Your contract is about to expire, so remember to book your service with your representative!

New Users becomes Loyal Users

39
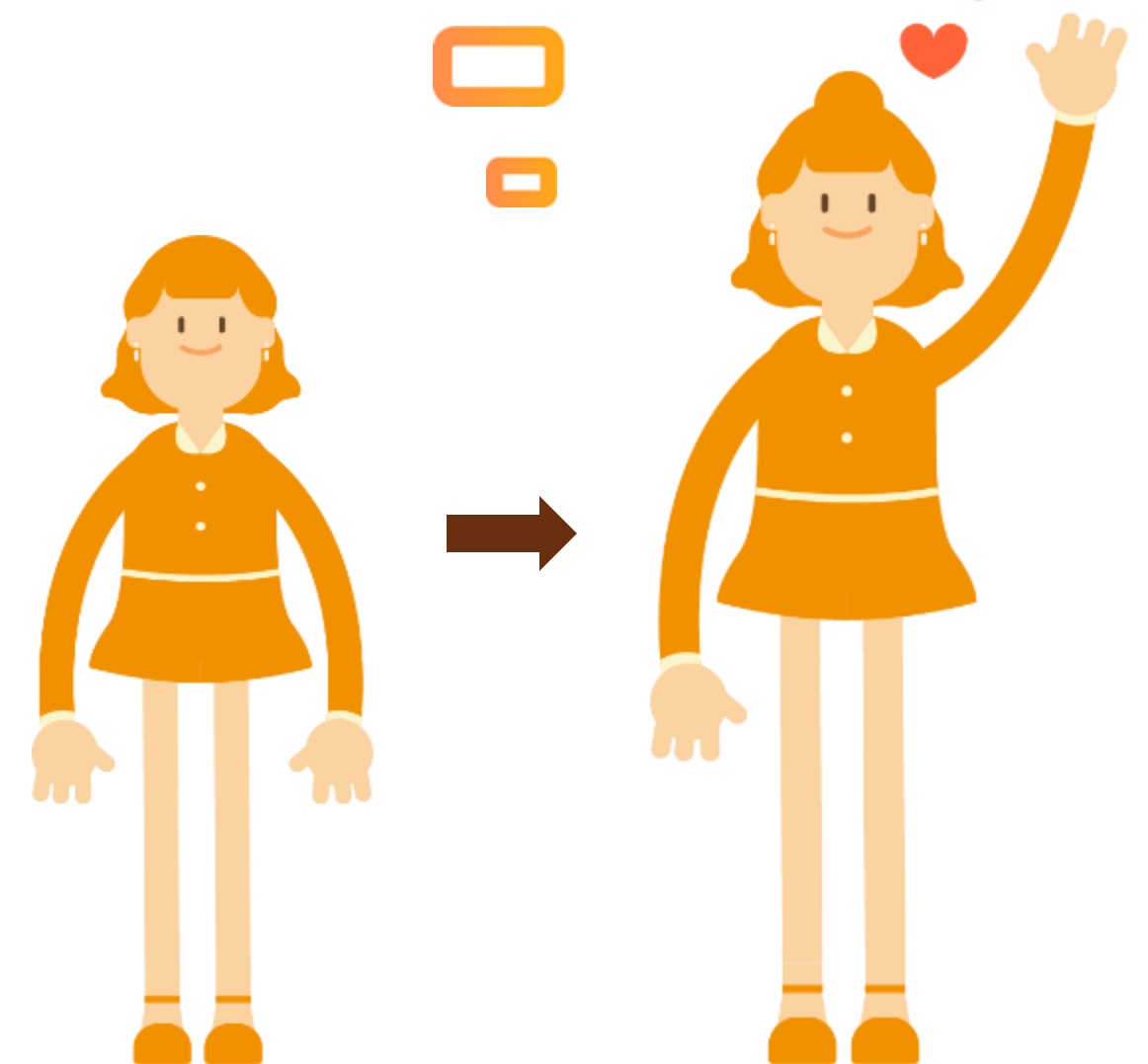
- How many customer complaints last month?

- Are there more recent complaints compared to before? Which customers submitted the most complaints?

- What types of issues have customers been reporting recently? For example: product suggestions, complaints, returns and exchanges, order modifications, etc. How many of each? Which customers did those issues come from?

- How many issues were resolved at the front line? How many issues were resolved later?
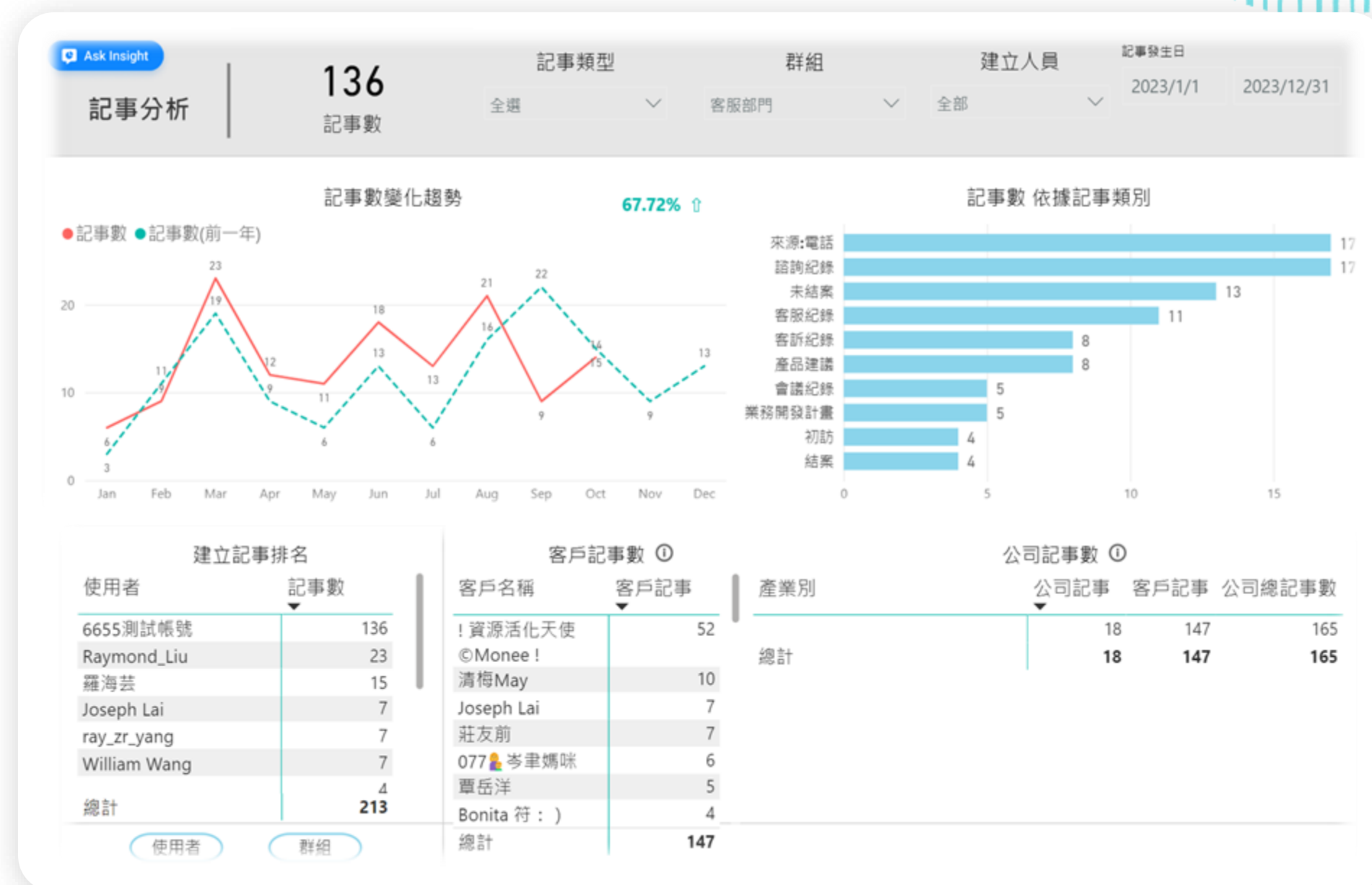
- How many tasks have been completed? How many are pending?
- Which colleagues have overdue tasks? How many tasks are there?
- Has the number of tasks completed on time this month improved compared to last month?
- What types of tasks is customer service currently handling?
- Has the number of repair requests decreased this month? How many have been closed?
- How many tasks are still in the second-line phase?
- Has there been an increase in proactive care and opportunity discovery?
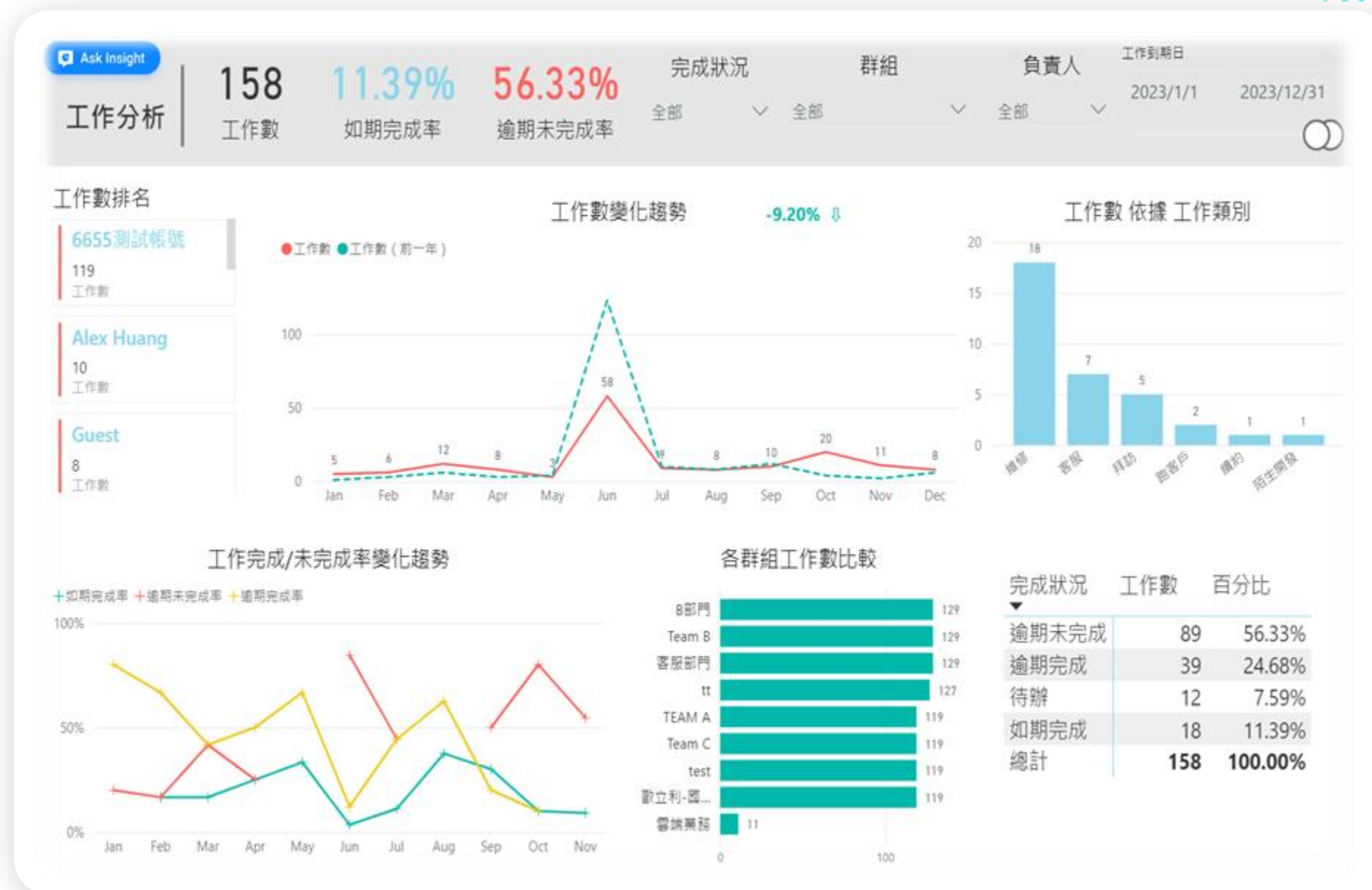
Solution Features

VITAL CRM

Marketing

Application Features in Marketing
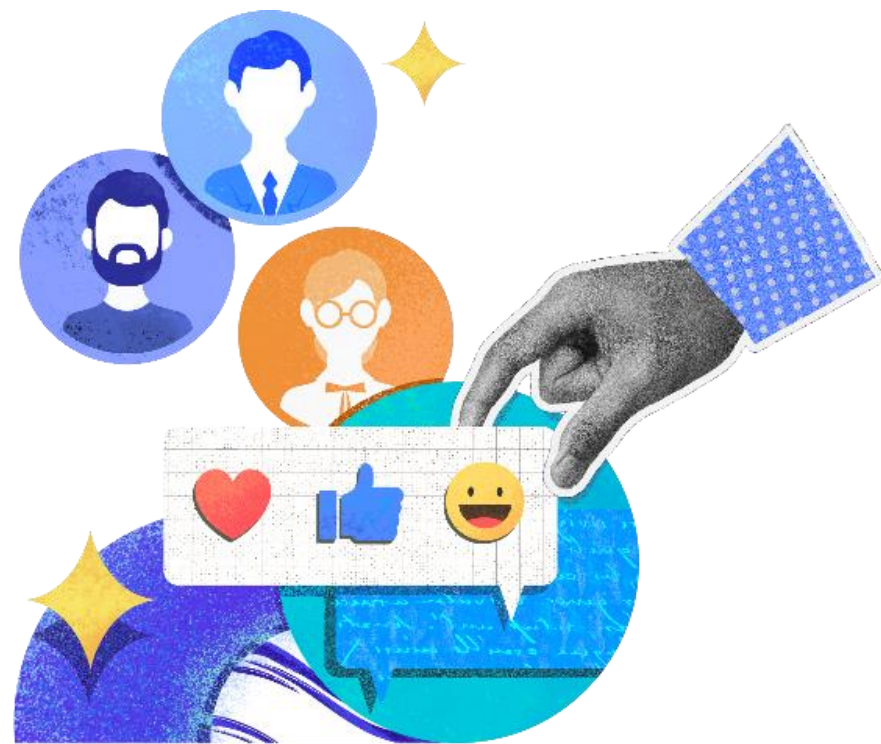
✓ Convenient customer data collection

✓ Multi-dimensional tag filtering for precise customer targeting

✓ Diverse marketing message delivery

✓ Event activity tracking for marketing effectiveness

Integrate customer data from multiple channels to provide personalized marketing content

VITAL CRM

beBitTECH

Crescendo lab

360° Omni-channel Customer Data

Basic Information	Product Preferences
Service Record	Order Record
Connections	Maintenance History
Data Analysis	Marketing Activity

SurveyCake

滿意度問卷收集

線上官網

LINE Official Account

Vital BizForm
Smart Form

VITAL BizForm

VITAL CRM

Super8

Messenger

Order System

1-item-1-code
Warranty
Repair

VITAL TTC

ERP

EVOX

Cloud PBX
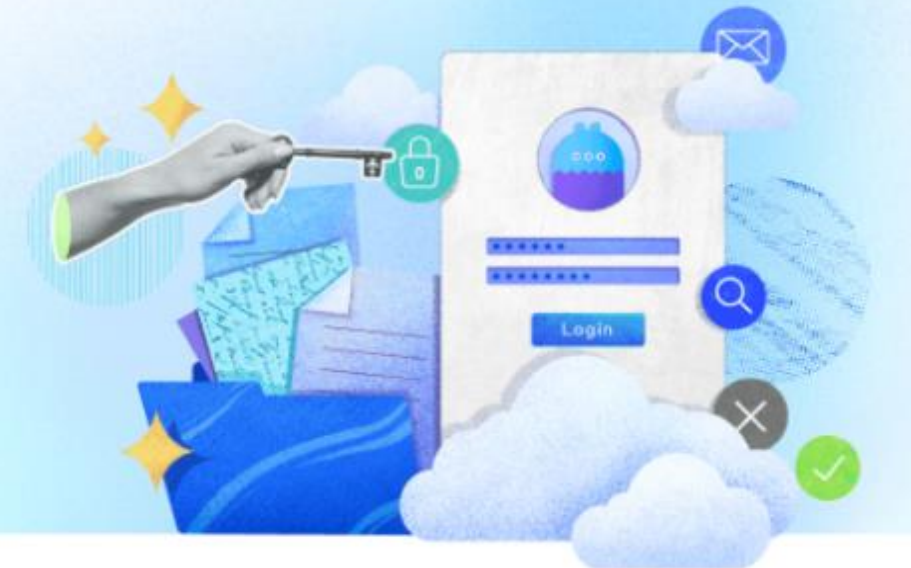
Substantially reduce the time to organize customer data in EXCEL by 92%

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VITAL CRM

Day 1

Dear OOO,
Thank you for visiting us in XX event! I'm Joy, and I'll be your contact for today. If you have any questions or need further information, please feel free to reach out to me!

Automatically Add To-Do Task Reminders for Yourself or Colleagues.

Day 5 (1st Week)

Dear OOO,
Here's an introduction to the applications of our products. Is it convenient for us to do some introduction this week? I'd love to share more application cases with you!

Personalized Care with a Warm Touch

Day 10 (2nd Week)

Dear OOO,
I'd like to share application cases of your industry. Feel free to request our product catalog for free, and if you need samples, don't hesitate to contact me!

Day 15 (3rd Week)

Haven't contacted us yet? Feel free to subscribe to our newsletter for free and receive the latest industry information regularly!

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VITAL CRM
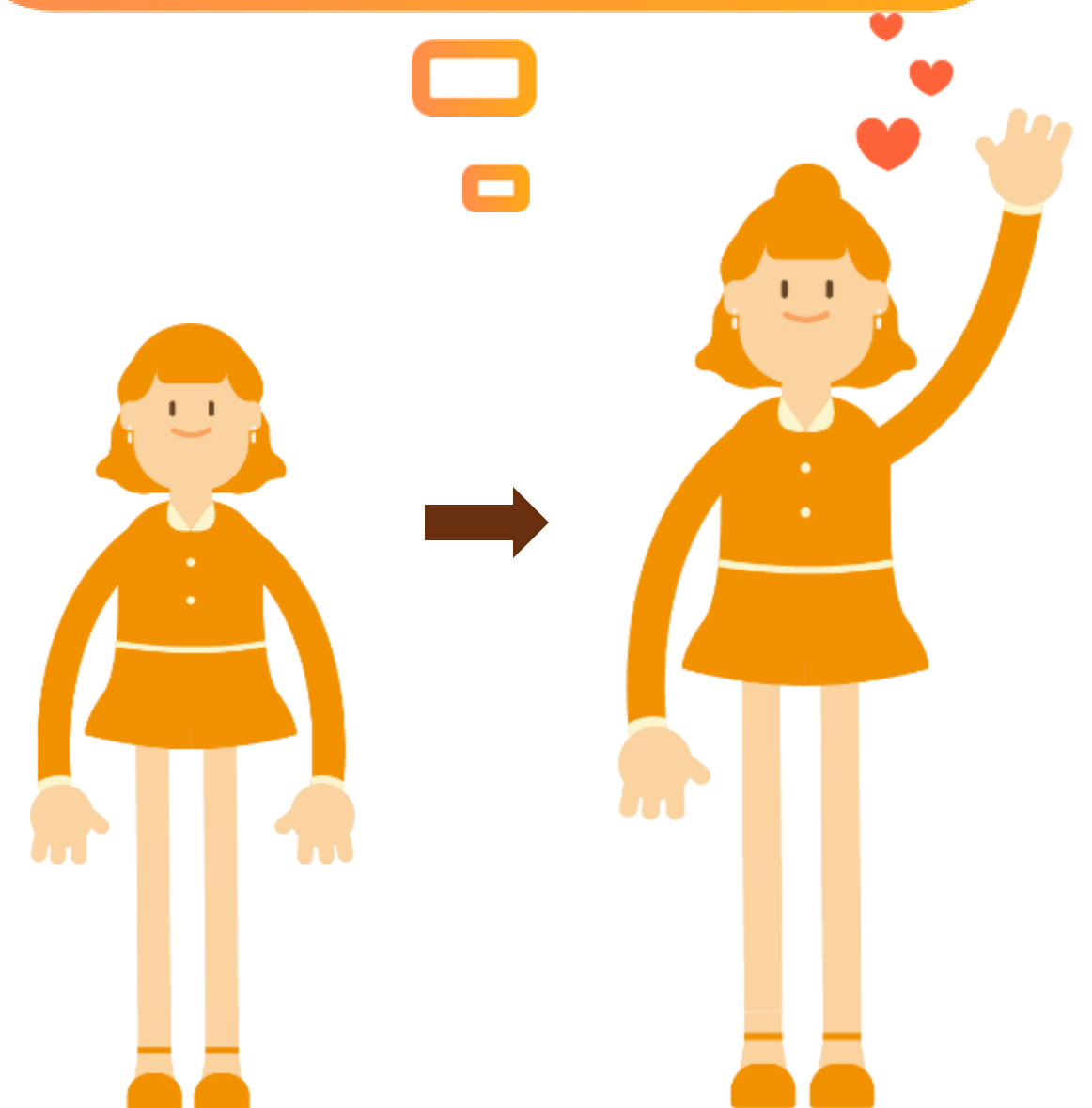
Let the system handle repetitive tasks and save resourrces with the Automation Center

Check at a Specific Time under Specific Condition(s) of the customer list to do Specific Task(s)

- Every night at 10 PM, check customers who made the 1st purchase of a specific product and put an after-sales care tag to them.
- Every day, check for customers with a specific ta (my criteria) and apply a care script to these customers.
- Every night at 11 PM, check customers added the previous day and apply a customized new customer development script to them.
- Whenever an order is placed, trigger a Webhook to automatically sync the data to the ERP system.

Workflow automation accelerates daily operations

It assists in tedious, routine tasks that require manual execution.

Automatically classify customer segments to achieve precision marketing

Based on consumer profiles, automatically apply customer tags to group clients, making it easy to do marketing automation

Multi-Platform Data Automation

When a new customer is input in CRM, the system will instantly notify your Webhook URL, synchronizing information across multiple systems.

The pain points of solely using LINE OA...

One side has genuine customer data, while the other side contains chat records from LINE friends...

When customers reach out via LINE, we only have their nicknames. Who exactly are they?

Customer inquiries are varied and scattered, making it difficult to find their service history!

With so many messages, to-do tasks are often overlooked and cannot be tracked!

LINE conversations with customers cannot be retained within the company.

Customers can't reach service personnel via LINE, leading to decreased satisfaction and missed business opportunities.
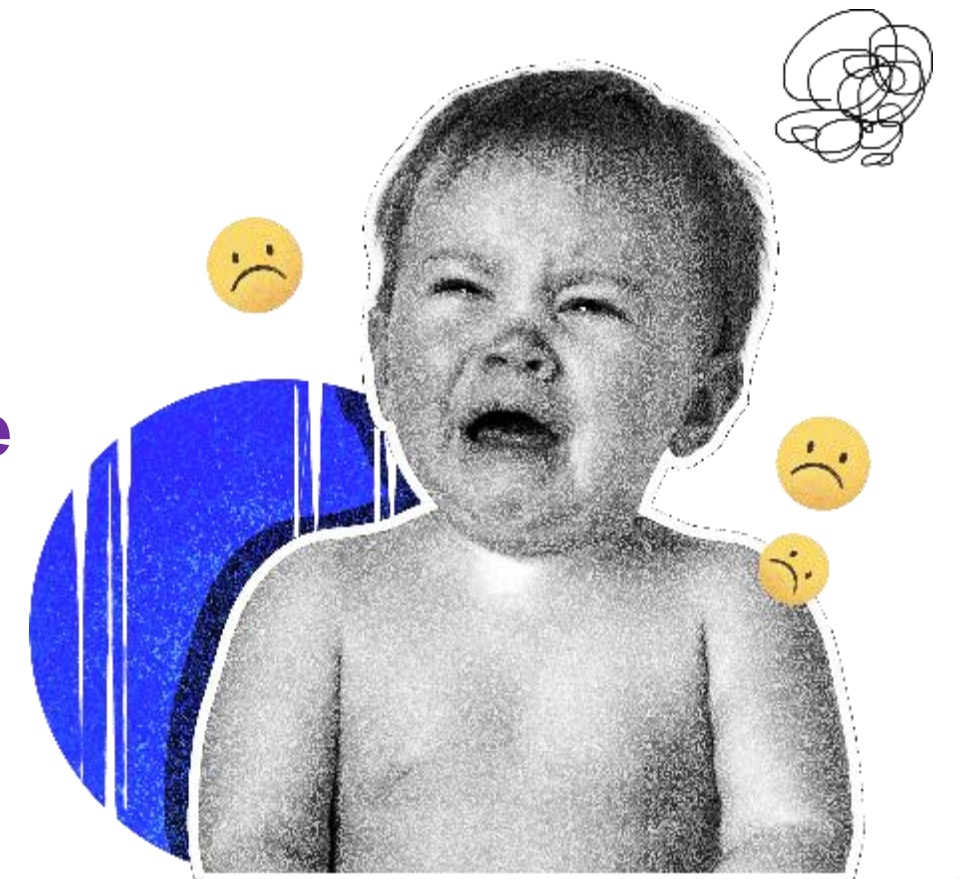
Vital CRM integrates with LINE OA:
Not missing customer needs, exceptional services & outstanding performance

1   Use "User Form" to link LINE friends with CRM customer data.

2   **Integrate LINE messages with CRM customer order records to get a whole picture of customer needs.**

3   **Use CRM customer tags to filter and send personalized LINE messages, developing potential customers.**

Vital CRM "User Form"

Vital Family Integration Features

Get Opportunities + Accelerate Business Advancement

VITAL CRM

On the CRM Customer Page :

✓ 1-click to add customer-related information to the table

✓ Integrate and present all forms related with customers