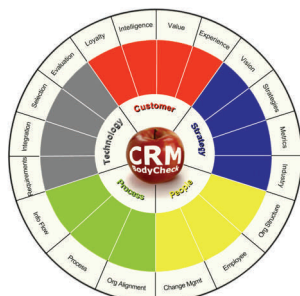


Customer Relationship Management

Foundation

In-house Training Program

Foundation Concepts	CRM Vision & Strategy Module CRM Objectives & Metrics Module Customer Loyalty & Satisfaction Module Customer Value & Segmentation Module CRM Critical Success Factors Module
Foundation Method	3C Introduction & 3C Metrics Module Customer Pyramid Module Customer Focus Module Customer Satisfaction Module Customer-Based Accounting Module
Customer Experience Management	Customer Value Module Customer Insight Module Branded Customer Touch-Points Module The CEM Method Module CEM Optimization Module



FREE Enterprise BodyCheck

During the promotion period (from now till Mar 31, 2006), enterprises who enroll for 2-day In-house Training Program will be given a FREE session of Enterprise BodyCheck. The free session will include a half-day on-site evaluation of the engaged enterprise plus a free report analyzing how well the enterprise is doing in terms of Customer, Strategy, People, Process and Technology, the five critical elements of any CRM success.



Program Description

The CRM Foundation In-house Training Program is designed to help enterprises building a solid foundation for their customer relationship management development. The Program offers three different sets of contents: **[Foundation Concepts]** focuses on the fundamentals and know-how to derive the CRM strategy, **[Foundation Method]** focuses on the methods and tools for successful CRM deployment, **[Customer Experience Management]** focuses on design and manage the optimal customer experience. This one-day program will focus on either one set of content at enterprises' own choice. Attendants will be equipped in practical knowledge and tools that can be immediately applied in business and different functional units including Sales, Marketing or Services.

What You Will Learn

The learning objectives of the CRM Foundation In-house Training Program are:

- ◆ To enable attendants **to plan** your customer relationship management initiatives
- ◆ To enable attendants **to execute** your customer relationship management initiatives
- ◆ To enable attendants **to evaluate** your customer relationship management initiatives

Who Should Attend

This In-house program is designed for a class of 10-20 attendants:

- ◆ **Managers / management staff of Marketing, Sales, Service Department**
- ◆ **Senior Management of the company**
- ◆ **Officers-in-charge of customer relationship management initiatives**

Remarks: Though this program is NOT suitable for front-line staff, it doesn't close the door to executives and managers from other functions, e.g. IT, HR, Operations, etc. The basic requirement is to have background knowledge or experience in management.

Pre-requisites For Attendance

No pre-requisites are required for attendees. The attendees, however, will be asked to complete a questionnaire prior to attending the program and send electronically to GCCRM to give instructor background information on their job responsibilities and any CRM initiatives within their company that would be important to understand.

When & Where

The training program will last for one day. However, it has to be booked a minimum of one month in advance.

The training program could be conducted at any city of the following regions:

- ◆ **Mainland China**
- ◆ **Greater China Region**
- ◆ **Asia Pacific Region**

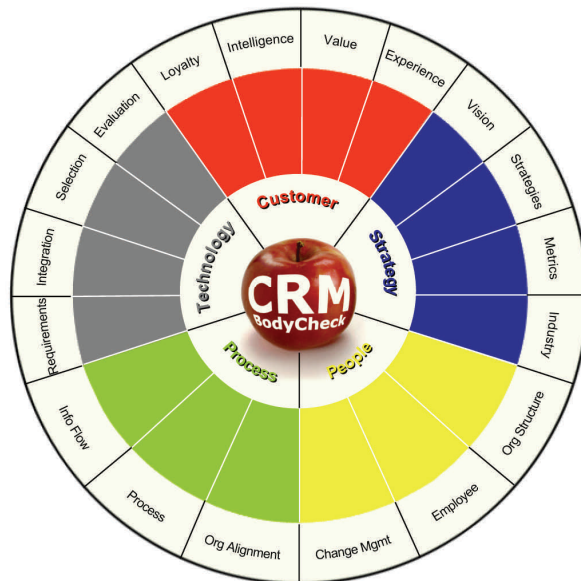
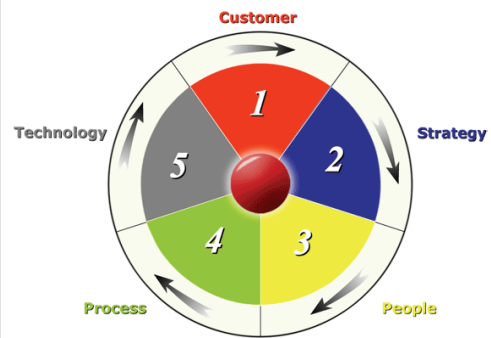
Language Medium

Mandarin, Cantonese or English.

About CRMBodyCheck

There are numerous reasons determining the success or failure of customer relationship management. One of the most critical and fundamental reasons is:

“ Implementation Sequence. ” ➔



Starting from understanding your **[Customer]**, you formulate your **Customer Strategy** based on your customer needs, which gives you a solid ground on your CRM **[Strategy]**. You can derive what type of **[People]** you need, train, motivate and retain them in line with your overall strategy. **[Process]** can be built on a logical and practical ground following this customer-centric approach. The final step is to decide your **[Technology]** support by choosing an appropriate software or tool that can fulfill the above needs.

Proper implementation sequence is the foundation to the success of customer relationship management.



The CRMBodyCheck is developed upon the backbones of the proper sequence; it is a CRM evaluation method originated and developed by GCCRM Global Advisors and Associates. It has been used as the evaluation criterion for Best CRM Practice Awards since 2002. The method offers 18 measurement metrics in 5 categories: **[Customer]**, **[Strategy]**, **[People]**, **[Process]** and **[Technology]**, which echoes the belief of “CRM Success Beyond Software”



GCCRM Global Advisors and Associates are formed by CRM Experts and elites from 11 countries.

Foundation Concepts

Description

The **[Foundation Concepts]** Training Program equips you the fundamentals to derive the CRM strategy, design the best customers, and design the best experiences. It also provides the practical know-how to successfully implement your customer relationship management initiatives.

Learning Objectives

The learning objectives of **[Foundation Concepts]** Training Program are:

- ◆ To formulate the CRM vision and strategies for your organization
- ◆ To derive the objectives and measurement metrics for your customer relationship management initiatives
- ◆ To define the best customers by analyzing the values and customer intelligence
- ◆ To design the best experiences via understanding the customer satisfaction and loyalty factors
- ◆ To maximize the ROI through rendering practical tips and the DO and DON'T advices

Content Sequence

The program content is sequenced as follows:

CRM Vision & Strategy Module	<ul style="list-style-type: none"> ◆ Mission & Values / Culture ◆ CRM Vision ◆ Formulation of CRM strategies ◆ Execution of CRM strategies
CRM Objectives & Metrics Module	<ul style="list-style-type: none"> ◆ Derive the CRM objectives ◆ Derive the CRM performance metrics ◆ Align CRM vision, strategies & objectives ◆ 18 Measures of CRMBodyCheck – A CRM Evaluation Method
Customer Loyalty & Satisfaction Module	<ul style="list-style-type: none"> ◆ The Delta Principle ◆ Transactional & Emotional Loyalty ◆ Satisfaction & Competition Level ◆ Customer loyalty factors ◆ Design the best customer experiences
Customer Value & Segmentation Module	<ul style="list-style-type: none"> ◆ Define your best customers ◆ Customer value factors ◆ Customer Lifetime Value (CLV) ◆ The LV Quadrant basics and applications ◆ Customer information requirements and collection techniques
CRM Critical Success Factors Module	<ul style="list-style-type: none"> ◆ How to get management support and colleagues buy-in ◆ How to conduct phased approach & pilot project to ensure quick wins ◆ How to set realistic budget for your customer relationship initiatives ◆ How to transform your organization from product-centric to customer-centric ◆ How to map the requirements of business, people, process and technology

Length: 1-Day

Learning Activities:

- ◆ Class Exercises
- ◆ Case Studies
- ◆ Team Presentations

Foundation Method

Description

The **[Foundation Method]** Training Program equips you with structured method and tools, practical know-how and tips to deploy the customer management method in your organization. It also helps you to segment your customers, improve customer profitability and maximize the effectiveness of resources allocation.

Learning Objectives

The learning objectives of **[Foundation Method]** Training Program are:

- ◆ To decide the measurement metrics for customer relationship management initiatives
- ◆ To segment your customers, prospects & suspects and monitor their movement migrations
- ◆ To diagnose and improve customer focus inside your organization
- ◆ To enhance customer satisfaction via formation of customer teams and collection of customer intelligence
- ◆ To measure, manage and improve customer profitability and ROI on Marketing, Sales & Service

Content Sequence

The program content is sequenced as follows:

3C Introduction & 3C Metrics Module	<ul style="list-style-type: none"> ◆ Customer relationship management basics ◆ Why 70% implementations failed ◆ Top 5 observations in Mainland China ◆ Customer Value / Behavior / Satisfaction / Focus Metrics
Customer Pyramid Module	<ul style="list-style-type: none"> ◆ Define your business, customer, and behavior variables ◆ Choose your own type(s) of customer pyramid ◆ Build your own customer pyramid(s) ◆ Practice The 3C Tool – The Customer Pyramid Builder
Customer Focus Module	<ul style="list-style-type: none"> ◆ Customer focus issues – organization / communication / information ◆ Diagnose your customer focus ◆ Identify priorities and form improvement groups ◆ Practice The 3C Tool – The Customer Focus Auditor
Customer Satisfaction Module	<ul style="list-style-type: none"> ◆ Define your value propositions & loyalty indicators ◆ Define your total spend & customer share factors ◆ Formulate cross-functional customer teams ◆ Conduct customer information quickscan
Customer-Based Accounting Module	<ul style="list-style-type: none"> ◆ Define and allocate your sales, marketing and service costs ◆ Generate & analyze customer profitability per customer / customer segment ◆ Derive customer migration matrix ◆ Practice The 3C Tool – The Customer-Based Accountant

Length: 1-Day

Learning Activities:

- ◆ Exercises
- ◆ Case Studies
- ◆ Team Presentations

Customer Experience Management

Description

The **[Customer Experience Management] (CEM)** Training Program equips you the fundamentals to understand the real needs & values of your target customers and maximize their satisfaction. It also provides the know-how and tools to design, implement and manage the optimal branded customer experience.

Learning Objectives

The learning objectives of **[Customer Experience Management] (CEM)** Training Program are:

- ◆ To find out who are your best (target) customers and their values
- ◆ To understand the real needs and the buying impulses of your target customers
- ◆ To design and map your own multi-channel customer touch-points
- ◆ To learn and apply the CEM method to design the best customer experience
- ◆ To optimize your CEM via alignment of business strategies, customers' needs and enterprise's capabilities

Content Sequence

The program content is sequenced as follows:

Customer Value Module	<ul style="list-style-type: none"> ◆ Customer satisfaction, customer experience and expectation ◆ Customer value and customer loyalty ◆ Customer equity: treating customers as financial assets ◆ Calculate customer lifetime value (CLV)
Customer Insight Module	<ul style="list-style-type: none"> ◆ The problems and limitations of customer surveys and focus groups ◆ Understand the real needs of your target customers ◆ How customers make decisions to buy, and buy again ◆ Convert customer insights into deliverables
Branded Customer Touch-Points Module	<ul style="list-style-type: none"> ◆ The quantified costs of negative customer experiences & potential impact on revenues ◆ Brand positioning & brand promise ◆ Experiencing the brand and branding the experience ◆ Map your own multi-channel customer touch-points
The CEM Method Module	<ul style="list-style-type: none"> ◆ Confirm perceived brand values & image ◆ Understand current experience & expectation, identify critical experiences ◆ Gap analysis on desired & actual critical experiences, map requirements to fill the gaps ◆ Align requirements with strategy, people, process & technology ◆ Feedback mechanism for continuous improvements
CEM Optimization Module	<ul style="list-style-type: none"> ◆ Shaping a unified brand experience ◆ Organization & people requirements for CEM ◆ The optimal level of customer-centricity ◆ Alignment of business strategies, customers' needs and enterprise's capabilities

Length: 1-Day

Learning Activities:

- ◆ Exercises
- ◆ Case Studies

Enterprise BodyCheck (Optional)

The Enterprise BodyCheck is designed to evaluate the five key sectors of enterprise in customer relationship management. It will be conducted via pre-evaluation questionnaires and on-site evaluation interviews. The 18 measures of **5 key** sectors are:

Methodology

The Enterprise BodyCheck will be conducted on the basis of the capability assessment of those 5 key sectors and 18 measures. The pre-evaluation questionnaire will collect the ratings and weighting figures from the enterprises' representatives in key and relevant functions. The half-day on-site evaluation will focus on interviews with several key personnels from direct related functions, and the assessor will mark and judge based on the CRMBodyCheck evaluation criteria.



[Customer]	Loyalty, Intelligence, Value and Experience
[Strategy]	Vision, Strategies, Objectives and Industry Monitoring
[People]	Change Management, Employee Achievement and Organization Structure
[Process]	Information, Process and Organization Alignment
[Technology]	Requirement Mappings, Integration & Compatibility, Selection & Evaluation of Technology

Personnel Involved

OPTION 1 Conduct the BodyCheck on Company Basis	<ul style="list-style-type: none"> ◆ <u>Pre-evaluation Questionnaire</u> (rate and weight the 18 measures) A minimum of 20 executives/managers/directors from Marketing, Sales, Service, IT & Management ◆ <u>On-site Evaluation Interviews</u> (a maximum of 3-hour one-on-one conversation, no prior preparation required) A minimum of 5 executives / managers / directors each from the above 5 functions
OPTION 2 Conduct the BodyCheck on Division / Department Basis	<ul style="list-style-type: none"> ◆ <u>Pre-evaluation Questionnaire</u> (rate and weight the 18 measures) A minimum of 20 executives/managers/directors from Business, Operations& Management of that division / department ◆ <u>On-site Evaluation Interviews</u> (a maximum of 3-hour one-on-one conversation, no prior preparation required) A minimum of total 5 executives/managers/directors from the above three functions

Deliverables

A simplified version of enterprise evaluation report features on the 18 measures of the 5 key sectors [Customer], [Strategy], [People], [Process] and [Technology] will include:

- ◆ **The aggregate weighting scores from enterprise's perspective**
- ◆ **The capability assessment scores from enterprise's perspective**
- ◆ **The objective capability assessment scores from on-site evaluation**
- ◆ **The derivation of critical capabilities from gap analysis**

Remarks: The simplified version of the evaluation report is completed based on the questionnaires and half-day interviews conducted on-site. Results are for your internal reference only as limited information is accessed and is not sufficient to form a comprehensive review about the whole organization / departments concerned.

Confidentiality

All data collected will be used anonymously and for GCCRM research and analysis purpose only. No individual company name will be released.

Agenda

The Enterprise BodyCheck - Simplified Edition is an optional service offered to the enterprise who enrolls for the CRM Foundation In-house Training Program. It includes a half-day on-site evaluation + a simplified version of evaluation report. During the special promotion period, this service is offered for free with the purpose to conduct more surveys and collect more data for further analysis and enhancement of the evaluation method.

A Simple 5-Step Enterprise BodyCheck Agenda

Step	Date	Description	Involved Parties / Action By
1	21 Days before training	Decide the list of people (minimum 20) to answer pre-evaluation questionnaires	Enterprise's coordinator
2	7-21 Days before training	Fill in the questionnaires (rate and weight the 18 measures)	More than 20 executives/managers/directors
3	7 Days before training	Submit the questionnaires	Enterprise's coordinator
4	1 Day before training	On-site Evaluation Interviews (a maximum of 3-hour one-on-one conversations, no prior preparation required)	More than 5 executives/managers/directors
5	21 Days after training	Submit Simplified Version of Enterprise BodyCheck Evaluation Report	GCCRM

Training Agenda

Foundation Concepts		Foundation Method		CEM
CRM Vision & Strategy Module	0900-1000	3C Introduction & 3C Metrics Module	0900-1000	Customer Value Module
Morning Break I	1000-1015	Morning Break I	1000-1015	Morning Break I
CRM Objectives & Metrics Module	1015-1115	Customer Pyramid Module	1015-1115	Customer Insight Module
Morning Break II	1115-1130	Morning Break II	1115-1130	Morning Break II
Customer Loyalty & Satisfaction Module	1130-1230	Customer Focus Module	1130-1230	Branded Customer Touch-Points Module
Luncheon	1230-1330	Luncheon	1230-1330	Luncheon
Customer Value & Segmentation Module	1330-1430	Customer Satisfaction Module	1330-1430	The CEM Method Module
Afternoon Break	1430-1445	Afternoon Break	1430-1445	Afternoon Break
CRM Critical Success Factors Module	1445-1545	Customer-Based Accounting Module	1445-1545	CEM Optimization Module
Case Studies / Discussion / Team Presentations	1545-1630	Case Studies / Discussion / Team Presentations	1545-1630	Case Studies / Discussion / Team Presentations

Program Leader



Sampson Lee
President of GCCRM
Co-founder of 3C Method (now located at Shanghai)

Sampson founded GCCRM in 2001 and co-founded The 3C Method (China Customer Care) in 2002. GCCRM is an independent CRM evaluation organization. Through evaluation, enhancement and benchmark with best practices, GCCRM helps to roadmap organizations' CRM. He provides training and consulting to first tier multi-national companies and leading conglomerates in Greater China region including Lenovo Group, Kodak, FedEx, Bertelsmann Group, Wyeth, Siemens Mobile Communications. He speaks for many C-Level Forums and events on the topics of CRM Evaluation and Benchmarking and also Best CRM Practice in China. He is the Visiting Lecturer of the HK University master degree program (customer relationship management module).



Candice Chee
Managing Partner of MetaCore Asia (now located at Singapore)

A Consultant and Marketer by profession, Candice founded MetaCore Asia with a team of like-minded professionals dedicated to building best-in-class customer-based marketing strategies for companies in Asia. She has had intensive hands-on experience in the conceptualization, integration and management of Database, Direct Marketing, Integrated Marketing Communications, Loyalty Marketing, Internet Marketing, Customer Relationship Marketing/Management, and One-to-One Marketing initiatives. She has been instrumental in creating customer value for many MNCs and Fortune 500 companies in the FSI, Healthcare, Retail, Hospitality, Services and Automobile verticals.



Ro King
Founding Partner of Quaero (now located at Jakarta)

Brings to client engagements more than 15 years of experience in the areas of direct marketing, customer contact management, and strategic planning. Ro guides Fortune 500 and Internet 100 firms in building databases of customer information, analyzing data to better understand and anticipate customer behavior, and implementing the tools and processes to conduct marketing campaigns that integrate direct mail, call center, e-commerce, and direct sales channels. Ro's clients include foremost firms in financial services, hospitality, retail, and pharmaceuticals where her most recent work focuses on customer data strategy, direct marketing process redesign, and e-marketing and direct mail project planning with ROI justification.

GCCRM Clients

			Bertelsmann China, Lenovo, Texas Instruments Taiwan, FedEx China, L'Oreal China, StarTV, Shanghai Roche, China Wyeth, Rockwell, Siemens, Mercer Consulting, Christian Dior, Brilliance Auto, Cosco Logistics, Avaya, Sina, Wicresoft, Xiang Lu Petrochemicals, Xiang Lu Fibers, Sunday, CEIBS, Beijing Saite, Alibaba.com, Shanghai GM, Domino Coding, Dahua Group, ICI Paints, Tsing Hua University, 21st Century Business Herald, Minsheng Life Insurance, Asia Info, Novo Nordisk Pharmaceuticals, Nortel Networks, Manulife-Sinochem Life Insurance, Shanghai Vanke, Beijing Founder, Shanghai Unionpay, 800 Teleservices, TVSN, Shanghai Volkswagen, Arvato, Ricoh China, Trend Micro, Jockey Club etc.

About GCCRM

Vision

ROADMAP CRM BEST PRACTICE through the collaboration of global intelligence on evaluation and benchmarking.

GCCRM is an independent CRM evaluation organization founded in 2001. Through evaluation, enhancement and benchmark with best practices, GCCRM helps to roadmap organizations' CRM - where they are, where to go and how to get there. GCCRM preaches the belief of "CRM Success Beyond Software" via awards, methodology, research & portal.

GCCRM Associates

GCCRM Associates is formed by 15 world famous CRM gurus from North America, Latin America, Europe, Asia Pacific and Greater China. They contribute to the development of CRM evaluation method - CRMBodyCheck, and conduct CRM training programs on evaluation and enhancement for the enterprises in Asia Pacific region.



Best CRM Practice Awards

Best CRM Practice Awards program is a widely recognized award for the CRM community. It has been launched since 2002 on an annual basis. The key objective is to enhance the standard of customer relationship management through benchmarking with best practices. Every year, the winning enterprises share their success experiences through case studies, public speeches and publications in major regional media and marketing channels. In 2005, the Awards election is extended to Greater China and Asia Pacific region.



The CRMBodyCheck

The CRMBodyCheck is a CRM evaluation method originated and developed by GCCRM and its Global Advisors and Associates. It has been used as the evaluation criteria for Best CRM Practice Awards since 2002. The method offers 18 measures in five categories: Customer, Strategy, People, Process and Technology, which echoes the belief of "CRM Success Beyond Software".



The 3C Method

The 3C Method is co-developed by GCCRM and CMI (Customer Marketing International, Netherlands-based). It is a structured customer management method to measure, manage and enhance customer performance and customer focus. Since the launch in 2002, hundreds of MNCs and local enterprises have attended the 3C trainings and adopted the 3C Method within their organizations in Greater China region.



China CRM Forum

China CRM Forum is jointly organized by GCCRM and CRMGuru (the world's largest CRM community, US-based). It is an annual event to showcase the collaboration of global and local intelligence – the experience-sharing of top-notch gurus all-over-the-world, and case presentations by award-winning enterprises of Best CRM Practice Awards. Since 2003, the Forum has been held every year by end March in Shanghai.

GCCRM.com

GCCRM.com is the world's only bilingual (Chinese and English) CRM portal, and the largest online CRM community in Greater China, with over 70,000 members from 100 countries. It provides valuable CRM knowledge and insights, via exclusive articles contribution from GCCRM global and China advisors, selected white papers and case studies from leading consulting companies and enterprises. Targeted mailings are sent in the form of monthly e-newsletters and e-alerts to confined segments of CRM executives, from C-Level to top and middle management to frontline executives.



SmartCRM

SmartCRM is an online networking community for business professionals in Customer Relationship Management, Marketing, Sales, Service, IT and Management. Through networking engine, BBS, free job searching & listings and referrals' benefits, SmartCRM provides a platform for professional networking, not only for fun but also for valuable information and earning SmartPoints. SmartCRM is a joint venture of GCCRM (70,000+ members in 100 countries) and SmartClub (500,000+ members in China). www.smartcrm.com.cn

Pricing Structure

	Foundation Concepts	Foundation Method	CEM
1-Day In-house Training	USD5,000	USD5,000	USD5,000
Flight & Accommodation Expenses-Overseas	To be discussed	To be discussed	To be discussed
The Enterprise BodyCheck – Simplified Edition (optional)	Waived (during promotion period)	Waived (during promotion period)	Waived (during promotion period)

Terms & Conditions

- ◆ All training venue, logistics and admin expenses are all on client company's expenses.
- ◆ 100% payment has to be made at least 14 days prior before the training day.
- ◆ The In-house training program is designed for a class of 10-20 attendants.
- ◆ Training materials will be sent to clients in advance in electronic (softcopy) format. No hard copies will be provided.
- ◆ All handouts and materials obtained in class are strictly for training purposes. GCCRM owns the copyrights of all program materials and no reproduction is allowed without the prior written consent of GCCRM.

Method of Payment

USD & HKD Account

Company: iMatchPoint Ltd
 Bank: Hong Kong and Shanghai Bank Corporation
 (Mongkok and Link Day & Night Banking)
 Bank Account: 004-534-233648-838
 Bank Address: 673 Nathan Road, Mongkok, Kln, Hong Kong

Contact Us

Tel: 8621-6351-4571 **Mavis He**
 8621-6351-2506 **Alice Tse**
 Fax: 8621-6351-2501
 Email: training@gccrm.com
 URL: www.gccrm.com