

# 2009/10年度 製造業中小型企業資訊科技培訓計劃課程

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# 製造業中小型企業資訊科技培訓計劃課程

## 簡介

是次課程由**香港無線科技商會**主辦，並由**政府資訊科技總監辦公室**的2009/10年度中小型企業資訊科技培訓計劃撥款資助。

根據中華廠商會2009年的調查，香港廠商主要面對成本上升和市場萎縮的挑戰。提升科技水平是應對當前經濟逆境的重要及有效方法。

本培訓計劃以一系列**免費**課程，鼓勵中小企港商利用資訊科技，減低營運成本、提高生產技術及員工效率。

## 課程內容

2009/10年度製造業中小型企業資訊科技培訓計劃課程分四期舉行。第三期課程「銷售及支援」包括五個組件：



Hong Kong  
Productivity Council  
香港生產力促進局

# 製造業中小型企業資訊科技培訓計劃課程

課程組件	日期 (2010年)	時間
客戶關係管理 (CRM)	六月一日 (星期二)	9:30 - 12:30 14:00 - 17:00
電子行銷及活動管理	六月三日 (星期四)	9:30 - 12:30 14:00 - 17:00
海外及國內電子商貿平台	六月十一日 (星期五)	9:30 - 12:45 14:15 - 17:00
銷售及營運的支援	六月廿二日 (星期二)	9:30 - 12:45 14:15 - 17:00
市場情報及知識管理	六月廿三日 (星期三)	9:30 - 12:30 14:00 - 16:30



# 客戶關係管理 (CRM)

客戶關係管理是提升企業成功的管理方式，能協助企業管理銷售循環，包括：**招徠新客戶、保留舊客戶、提供客戶服務及進一步提升企業和客戶的關係**，並運用市場行銷工具，**提供個性化的客戶商談和服務**，輔以相應的資訊系統如資料探勘和數據庫行銷來協調公司與顧客在銷售、行銷以及服務上的互動運作。

- CRM概要
- **租用型**CRM系統介紹
- 企業**自家擁有**的CRM平台介紹





# 客戶關係管理 (CRM)

- 通路互動型 (Communicational)
- 作業應用型 (Operational)
- 資料分析型 (Analytical)



# 製造業中小型企業資訊科技培訓計劃課程

## - 客戶關係管理 (CRM)

日期	演講時間	演講題目	講者及職銜
1 Jun 2010 (Tue)	10:00 - 12:30	- CRM概要 及 CRM平台介紹 - 租用型CRM系統介紹	吳志榮先生 資訊科技業發展部，高級顧問 香港生產力促進局
1 Jun 2010 (Tue)	14:00 - 17:00	- 企業自家擁有的CRM平台介紹	陳振華先生 Microsoft Dynamics 產品經理 微軟香港有限公司



# 電子行銷及活動管理

電子郵件行銷及搜尋行銷以相對低的成本遞送資訊到廣大範圍的潛在客戶。具體來說，使用得宜的話，比其他媒體如直接郵寄或打印商務通訊的**費用便宜**，並取得更佳效果。這種行銷方法讓廣告商**把訊息立即「推」到其客戶面前**；相反，網站得等客人上門。廣告商可以透過退件、終止訂閱、閱讀回條、點進率等等以追蹤使用者。

另一方面，「移動營銷」（Mobile Marketing）主要是指基於手機和其他以無線通訊技術為基礎而發展的一種全新的營銷方式。它融合了網絡經濟中的「網絡營銷」（Online Marketing）和「數據庫營銷」（Database Marketing）方法，透過手機或其他手提裝置運行。移動營銷為目前各營銷方法中最具潛力的部分。

- 電子行銷介紹
- 市面上有關e-DM及SMS的服務及產品
- 電子營銷及廣告應用及例子介紹
- 租用型行銷工具應用及例子介紹
- 手機遊戲及移動營銷介紹



# 製造業中小型企業資訊科技培訓計劃課程

## - 電子行銷及活動管理

日期	演講時間	演講題目	講者及職銜
3 Jun 2010 (Thu)	09:30 - 12:30	- 市面上有關e-DM及SMS的服務及產品	曾榮錦先生 助理市務總監 Wharf T&T eBusiness Limited
3 Jun 2010 (Thu)	14:00 - 17:00	- 租用型行銷工具應用及例子介紹	陳永康先生 董事 Master Concept (Hong Kong) Ltd.



# 海外及國內電子商貿平台

網上貿易及零售系統和其他電子商貿服務，能即時更新公司資訊，提升產品曝光率，有助產品宣傳之外，更可幫助中小企開拓更多商機，提升中小企的業務發展。中小企亦可利用電子商貿服務打造自家品牌，以開拓國際零售市場，讓客戶可於網上直接購買到自家研發品牌之產品。電子商貿服務往往利用到作業應用型CRM。系統包括前端的銷售（Sales）、行銷（Marketing）與顧客服務（Customer Service）套裝軟件等。作業應用型CRM能協助整合企業資源規劃系統與供應鏈管理系統，進而提供訂單執行（Fulfillment）與訂單追蹤（Order Tracking）等管理功能。

- 利用電子商貿提供產品零售服務
- 利用電子商貿進行產品批發銷售服務
- 如何將網站連結到熱門的網上社區作宣傳



# 製造業中小型企業資訊科技培訓計劃課程

## - 海外及國內電子商貿平台

日期	演講時間	演講題目	講者及職銜
11 Jun 2010 (Fri)	09:30 - 11:15	- 如何將網站連結到熱門的網上社區作宣傳	李松英先生 銷售主管 阿里巴巴香港有限公司
11 Jun 2010 (Fri)	11:30 - 12:45	- 手機遊戲及移動營銷介紹	梁劭斌先生 營運副總裁 綠蕃茄有限公司
11 Jun 2010 (Fri)	14:15 - 17:00	- 利用電子商貿提供產品零售服務 - 利用電子商貿進行產品批發銷售服務	周靄儀小姐 營運總監  霍文健先生 商業顧問部經理  周藹琳小姐 商業顧問部經理 泰美商業科技有限公司

# 銷售及營運的支援

銷售及營運的支援對每間公司亦很重要。一般而言，企業與其顧客可有不同的接觸方式與溝通。為進一步促使彼此間的交流互動，客戶可採用通路互動型CRM (Communication CRM)。系統主要以提供電腦電話語音整合客戶服務 (Computer Telephony Integration Center; CTI Call center)，及提供網頁、電子郵件、傳真、面對面等溝通管道整合方案為主。

- 網站內容更新管理及例子介紹
- 與客戶分享最新產品資訊簡介
- 利用文件管理系統 (DMS)協助進行每日的客戶支援服務
- 文件管理與工作流程系統方案及例子介紹

# 製造業中小型企業資訊科技培訓計劃課程

## - 銷售及營運的支援

日期	演講時間	演講題目	講者及職銜
22 Jun 2010 (Tue)	09:30 - 11:30	- 網站內容更新管理及例子介紹 - 與客戶分享最新產品資訊簡介	馮德聰先生 - 技術發展總監，資訊工房 - 政策委員會副主席，互聯網專業協會
22 Jun 2010 (Tue)	11:45 - 12:45	- 利用文件管理系統 (DMS) 協助進行每日的客戶支援服務	陳仲謙先生 業務推廣經理 緯泓軟件(亞太區)有限公司
22 Jun 2010 (Tue)	14:15 - 17:00	- 文件管理與工作流程系統方案及例子介紹	陳智勇先生 系統顧問  ACW Distribution (HK) Ltd. 林柏里先生 技術總監  Asta Systems Limited 鄧偉舜先生 業務拓展經理 Adobe Systems Hong Kong Ltd

# 市場情報及知識管理

成功的企業，能將從**各種溝通管道所蒐集到的顧客資料**，進行**分析顧客行為**，以作為企業決策判斷的依據。目前資料分析型CRM (Analytical CRM)系統主要是以傳統的數據庫 (Database)、資料倉儲 (Data Warehousing) 與數據挖掘 (Data Mining) 為主。此外，掌握客戶知識以後，再行與企業分享及開發新產品，迎合市場需要，是為致勝之道。

- 將電子營銷結合**商業智能概念 (Business Intelligence)**
- 客戶知識管理概念及個案分享
- 新產品開發及知識管理之關係
- 知識管理過程 - 知識收集及分享
- 利用文件管理系統 (DMS)及客戶關係管理系統(CRM)支援知識管理介紹及個案分享
- 項目管理技巧





# 製造業中小型企業資訊科技培訓計劃課程

## - 市場情報及知識管理

日期	演講時間	演講題目	講者及職銜
23 Jun 2010 (Wed)	09:30 - 11:15	<ul style="list-style-type: none"> <li>- 將電子營銷結合商業智能概念 (Business Intelligence)</li> <li>- 客戶知識管理概念及個案分享</li> <li>- 新產品開發及知識管理之關係</li> <li>- 知識管理過程 - 知識收集及分享</li> <li>- 利用文件管理系統 (DMS)及客戶關係管理系統 (CRM)支援知識管理介紹及個案分享</li> </ul>	吳志榮先生 資訊科技業發展部，高級顧問 香港生產力促進局
23 Jun 2010 (Wed)	11:30 - 12:30	項目管理技巧(Project Management)	Ms. Jennie Wong Project Director Access iVisions Ltd.
23 Jun 2010 (Wed)	14:00 - 15:00	<ul style="list-style-type: none"> <li>- MS-SharePoint product 經驗分享及示範</li> <li>- 重點介紹Document/ Knowledge management and BI (DM/ KM)的功能</li> <li>- 簡述系統如何幫助香港公司提高生產力及改善營運</li> </ul>	Dr. Joe Qiao Chief Technical Officer Fusion System Limited
23 Jun 2010 (Wed)	15:15 - 16:30	<ul style="list-style-type: none"> <li>- BI經驗分享及示範</li> <li>- 簡述系統如何幫助香港公司提高生產力及改善營運</li> </ul>	Ms. Eva Loh Sales Account Manager Masterson Technology Limited

# Agenda

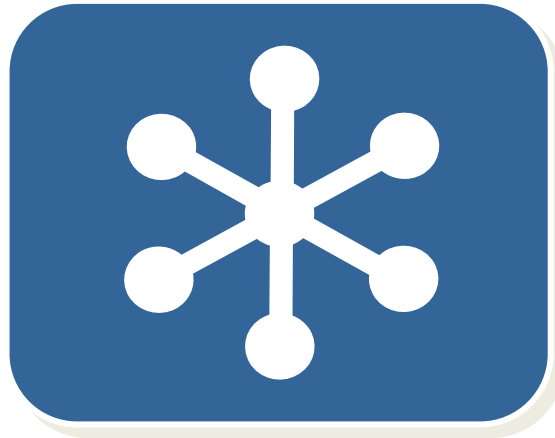
- Business Value & IT Investment  
商業價值牽引IT 投資
- Enterprise Upgrade – Challenge  
企業升級轉型的挑戰
- Customer Knowledge and Customer Intelligence  
客戶智識管理
- Demand Management and Supply Management  
需求及供應管理
- HKPC Methodology for CKM + SCM  
HKPC 顧問服務實施方法



# Business Value & IT Investment

## 商業價值牽引IT 投資

Business Goals  
商業目標



Business Strategies/Model  
Business Priorities  
商業策略/模型/優先次序



IT Investment Priority  
投資優先次序

Strategic IT Investment 策略投資  
Operational Efficiency 操作效率

# IT Investment

## IT 投資

- Purpose of IT Investment IT 投資目的



Aligning IT strategies to business goals IT 投資切合商業目標

IT projects that enable business growth IT 項目促進業務發展

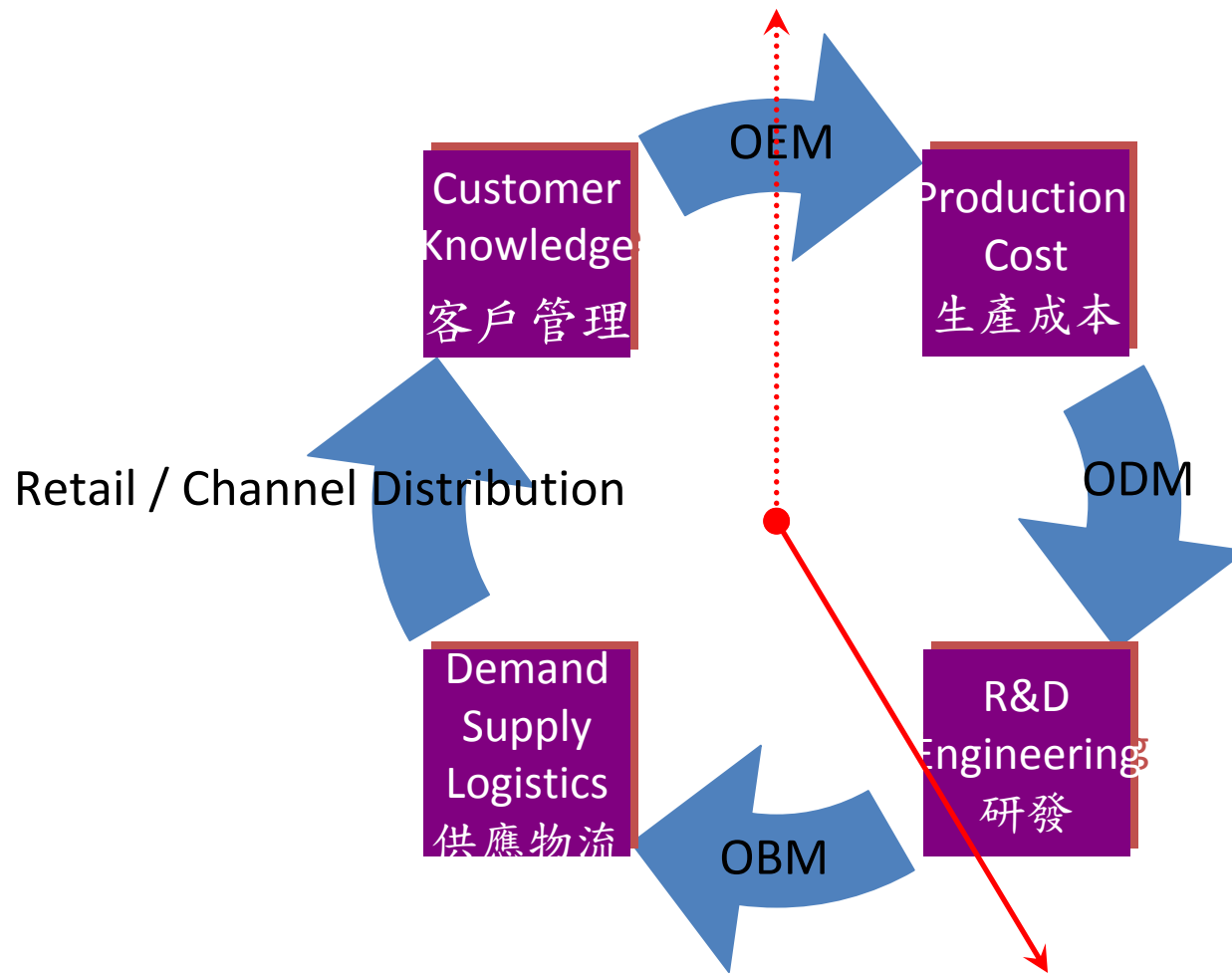


Corporate accountability and regulatory compliance mandates like Sarbanes-Oxley 切合會計及法律要求

IT investments can represent up to 50 percent of an organization's capital investment 可佔企業一半資產投資

# Enterprise Upgrade – Challenge

## 企業升級轉型的挑戰

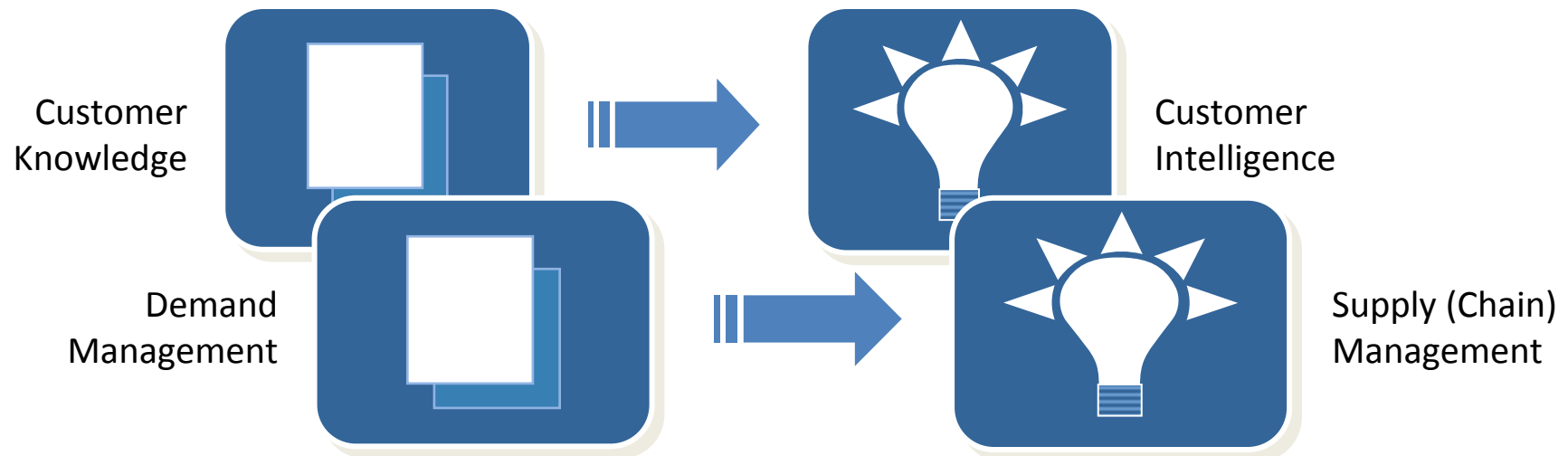




# Enterprise Upgrade – Challenge

## 企業升級轉型的挑戰

- Market Understanding 市場動態
- Marketing Strategy 市場推廣策略
- Sales Strategy 行銷策略
- Offering (Product Strategy) 產品策略
- Business Model 商業模型
- Vertical / Industry Strategy 垂直行業協作策略
- Innovation 創新
- Geographical Strategy 地域策略



# Market & Customer Intelligence

## 市場及客戶智識管理

- Understand the customer & provide Royal services  
了解客戶，提供服務



- Market Requirement Document
- Engineering Requirement Document
- User-Experience Requirement Document
- Beautiful
- 市場需求 / 工藝需求
- 客戶體驗 / 美觀



# Customer Intelligence

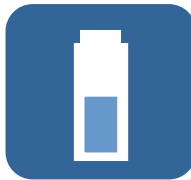
## 客戶動態

- ‘Customer is King’ 顧客至上



80% CEOs: excellent in serving customers

8% Customers: agreed 只有8%客戶同意



Lose more than half its customers

every 4 years 每4年流失一半客戶

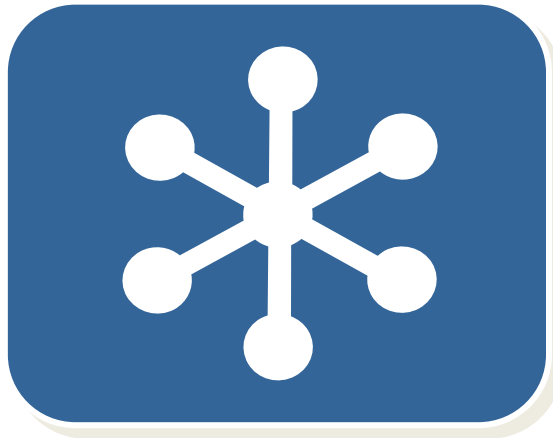
Source: Bain & Co.

# CKM – Market Implementation

## 客戶智識管理 – 市場實踐

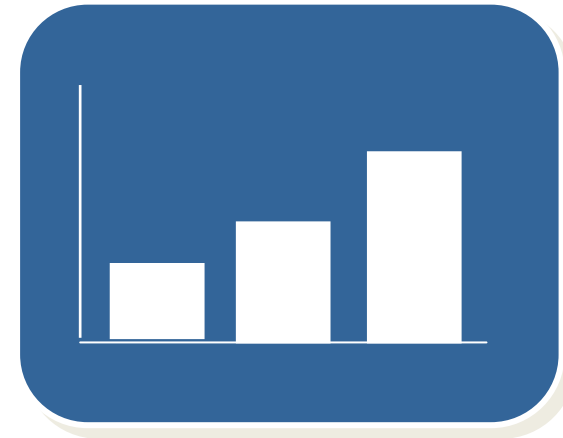
- Operation Challenges 運作困難

Diverse  
Customer  
Teams  
多銷售隊伍



Decentralized Customer  
Knowledge 客戶智識分散

Scattered  
Customer  
K-Points  
客戶分散

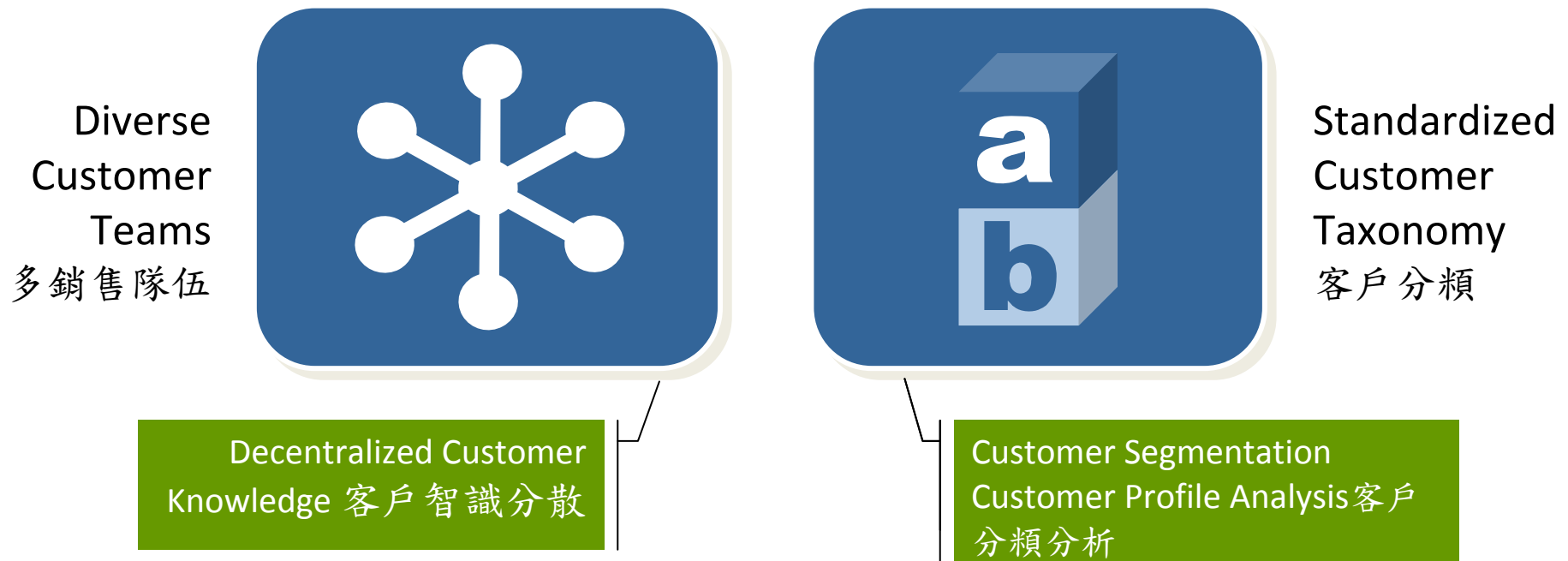


Unable to upgrade Business  
Model (OEM to ODM to OBM  
to Retail Channels) 升級轉型  
困難

# CKM – Market Implementation

## 客戶智識管理 - 市場實踐

- Knowledge Management 智識管理



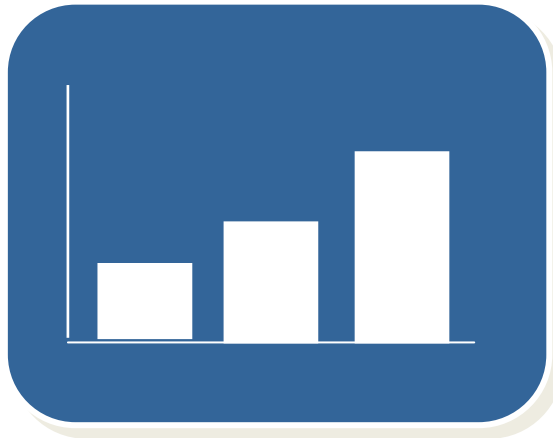


# CKM – Market Implementation

## 客戶智識管理 - 市場實踐

- Strategic IT Investment 策略投資

Scattered  
Customer  
K-Points  
客戶分散



Unable to upgrade Business  
Model (OEM to ODM to  
OBM to Retail Channels)  
升級轉型困難

Customer  
Knowledge  
Profiles  
客戶剖析



CKM Processes  
客戶資訊搜集流程  
CKM Tools/BI Tools BI 軟件工具

# CKM – Implementation Example

## 客戶智識管理 – 客戶案例

- Operation Efficiency 運作效率

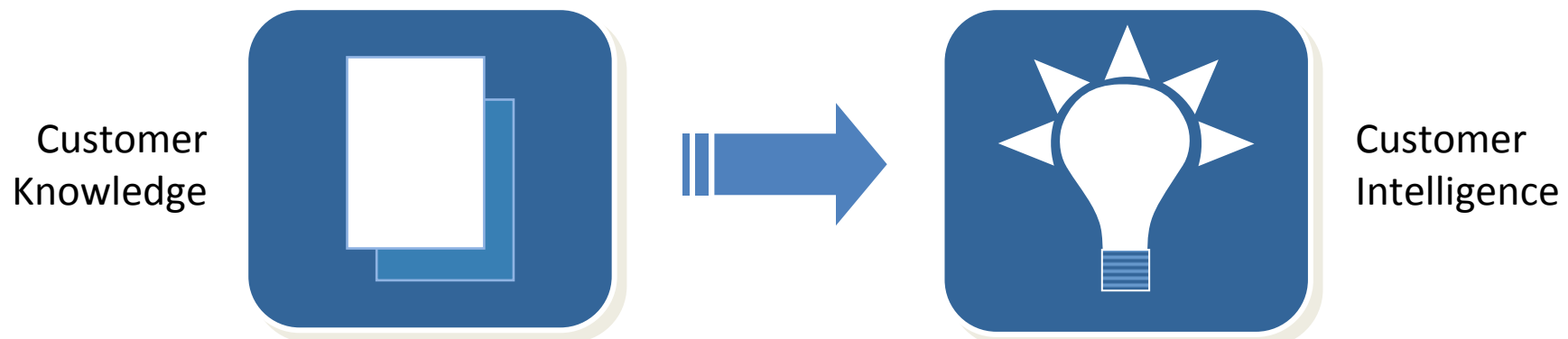
Cust. Name	Credit History	Sales Volume	Gross Profit %	Growth Opportunity	Quantity per SKU	.....	.....	....	...

Cust. Name	Credit History	Net Sales	Strategic Relationship	Growth Opportunity	Channel	....	....	....	.....

# CKM Benefits

## 客戶智識管理 - 效益

- Centralized view of key customers 掌握整體客戶資訊
- Customer strategies deployment 執行客戶策略
- Fast and accurate business decisions 快速商業決定
- Co-operations on resources 資源運用
- Collaborations on sales activities 協同銷售活動
- Speedy and right services to customers 快速服務

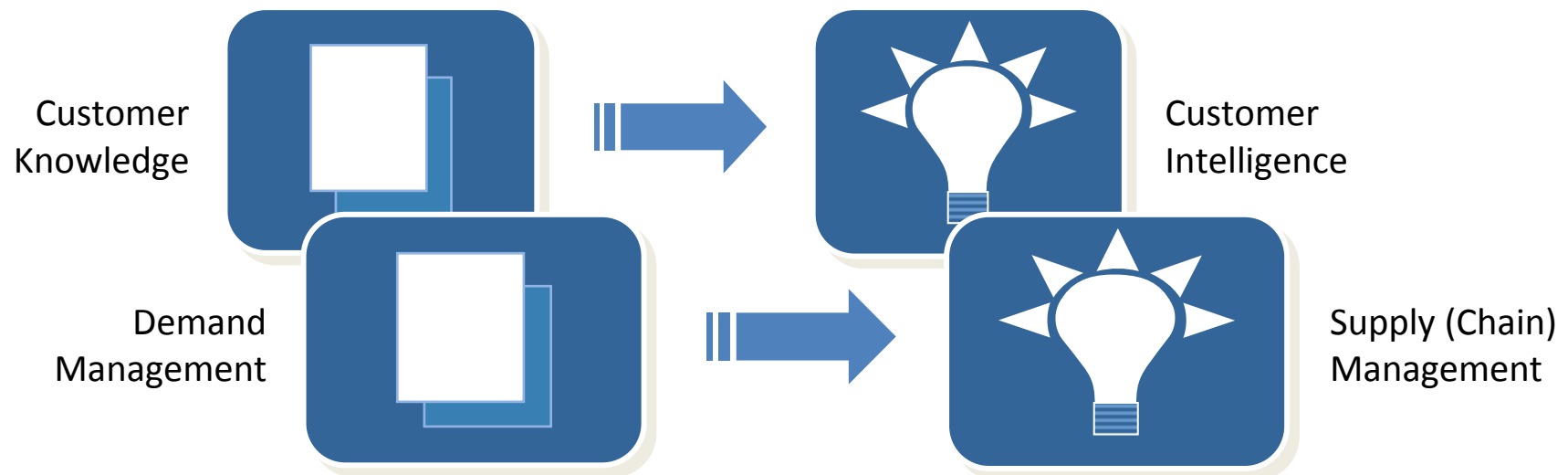


# Enterprise Upgrade – Challenge

## 企業升級轉型的挑戰

- Market Understanding 市場動態
- Marketing Strategy 市場推廣策略
- Sales Strategy 行銷策略
- Offering (Product Strategy) 產品策略

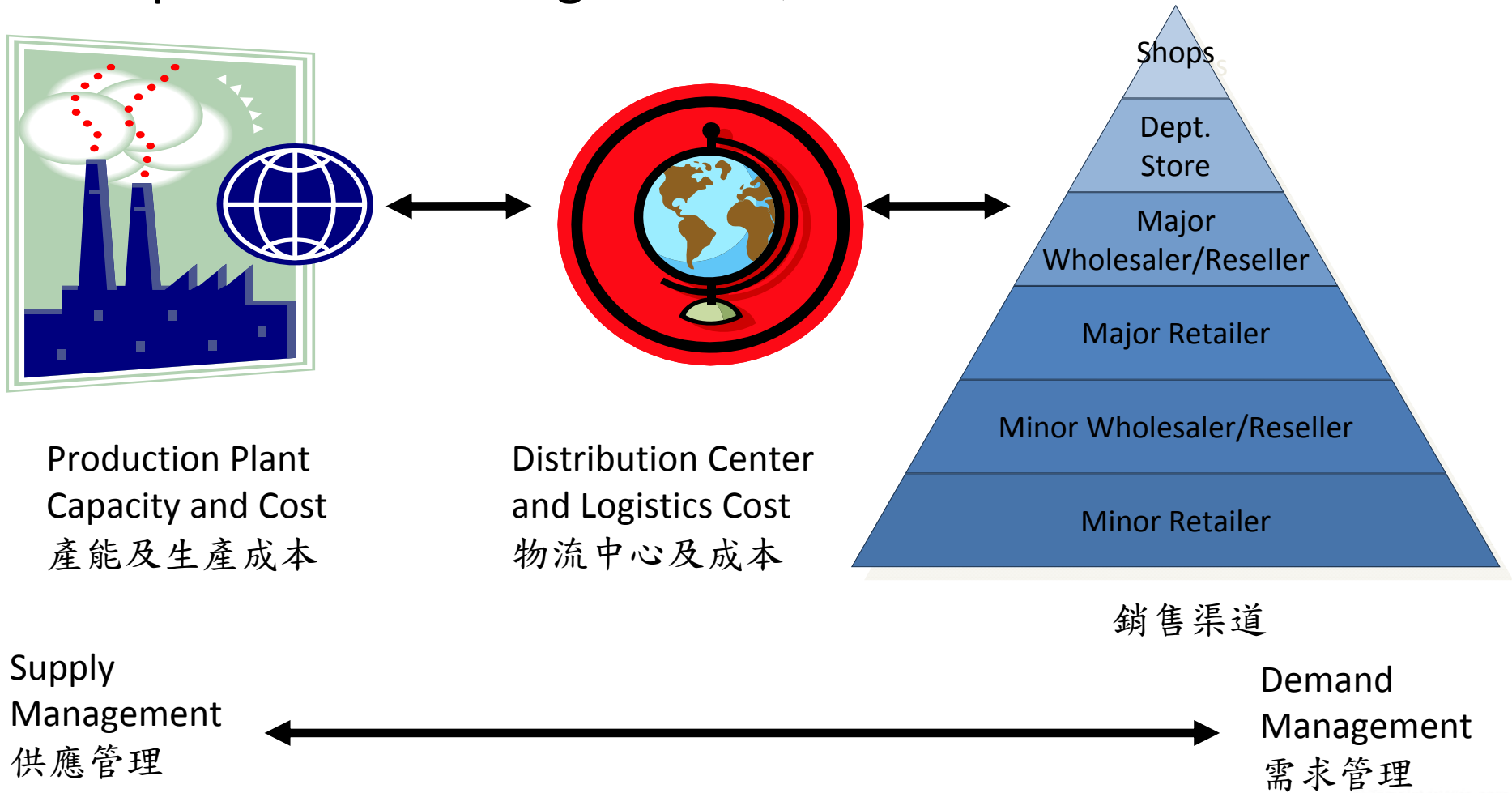
- Business Model 商業模型
- Vertical / Industry Strategy 垂直行業協作策略
- Innovation 創新
- Geographical Strategy 地域策略



# Geographical Coverage - Channel Establishment

## 地域策略－建立銷售渠道

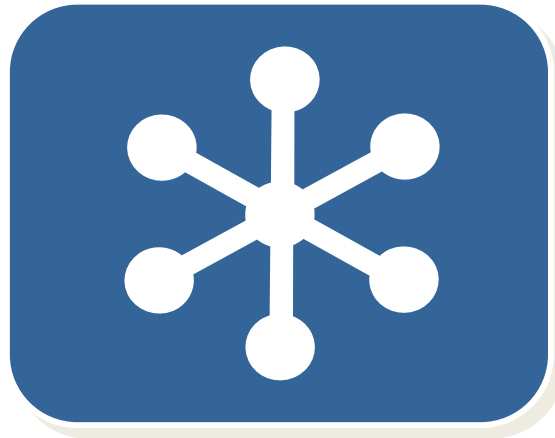
### • Operation Challenges 運作困難



# SCM – IT Investment

## 供應鏈管理策略投資

Diverse  
Market &  
Location  
銷售地點分散



Decentralized Dynamic  
Customer Needs 客戶需求  
分散



Resource  
Optimization  
& Cost  
Efficiency  
善用資源

Fast Response Operation  
Parameters, BI Tools - Cost  
Optimization 成本效益分析工具



# SCM – Implementation Example

## 供應鏈管理 – 客戶案例

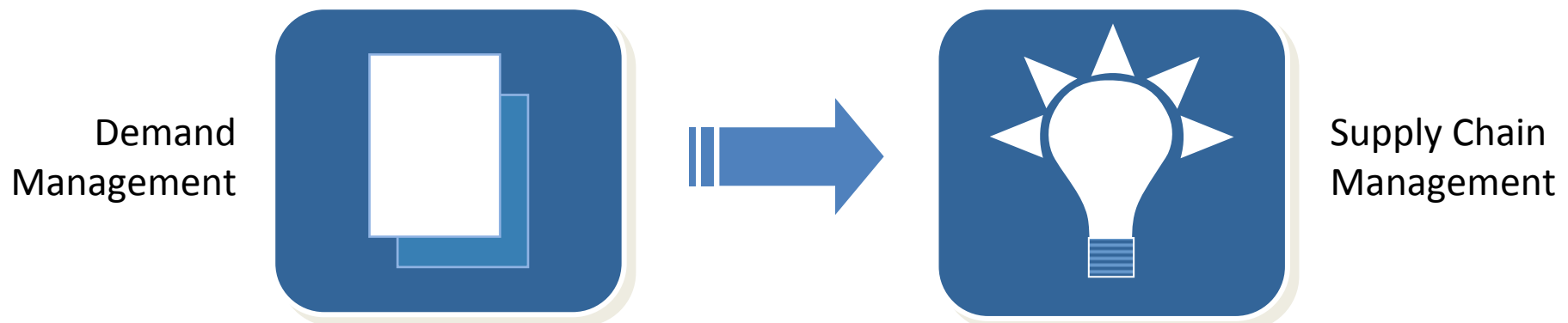
- Operation Efficiency 運作效率

Cust. Name	Product Item	Sales Volume	Plant Overhead	Truck Cost	Mileage	Logistics Cost	.....	.....	.....

# SCM Benefits

## 供應鏈管理 - 效益

- Centralized view of demand and supply chain 掌握整體需求及供應鏈
- Production capacity fully utilization and economy of scale 盡用生產資源
- Localization and legal compliance 切合本地要求
- Lowest operation cost 最低運作成本
- Speedy and right product to customers, minimize out-of-date product 減低過期產品



# HKPC Methodology on CKM + SCM

## HKPC 顧問服務實施方法

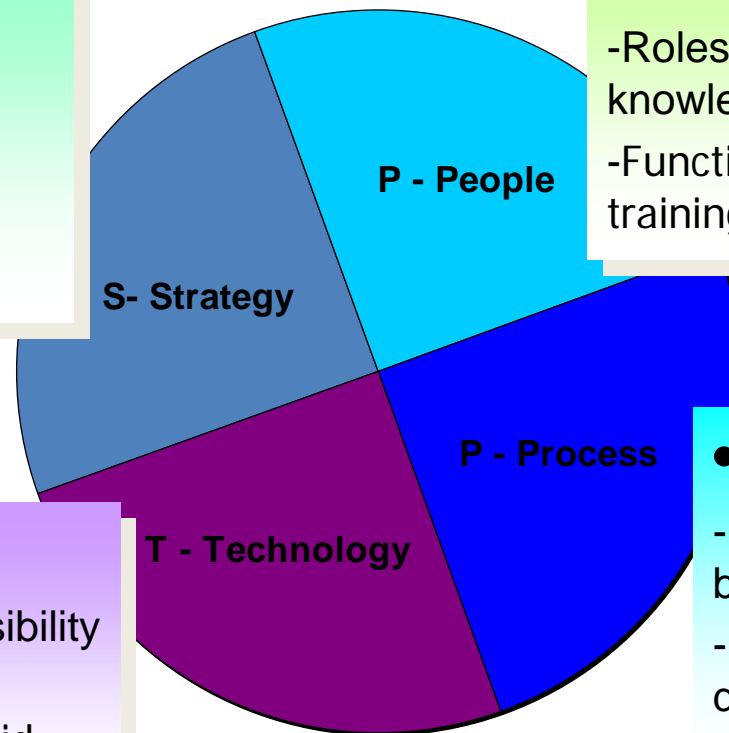
SPPT: Strategy, People, Process, Technology

### • Strategy 策略

- Critical components of Customer Strategy enablement
- Customer Knowledge structure

### • Technology 科技

- Availability and accessibility of existing tools
- Uncovering needs to aid knowledge flow



### • People 人才分工及發展

- Roles and responsibilities in the knowledge lifecycle
- Functional knowledge needs and training and development

### • Process 流程

- Knowledge flow in core business activities
- Relationship of knowledge and decision making

多謝!  
Thank You!





# CRM Strategy Formulation and Implementation



Hong Kong  
Productivity Council  
香港生產力促進局

Presented by:  
Kevin Ng  
IT Industry Development Division  
Hong Kong Productivity Council



# Agenda

- 1. CRM Implementation Elements**
- 2. Implementation Methodology**
- 3. CRM Strategy**
- 4. CRM Tactical Options**
- 5. CRM System Types**
- 6. Case Studies**



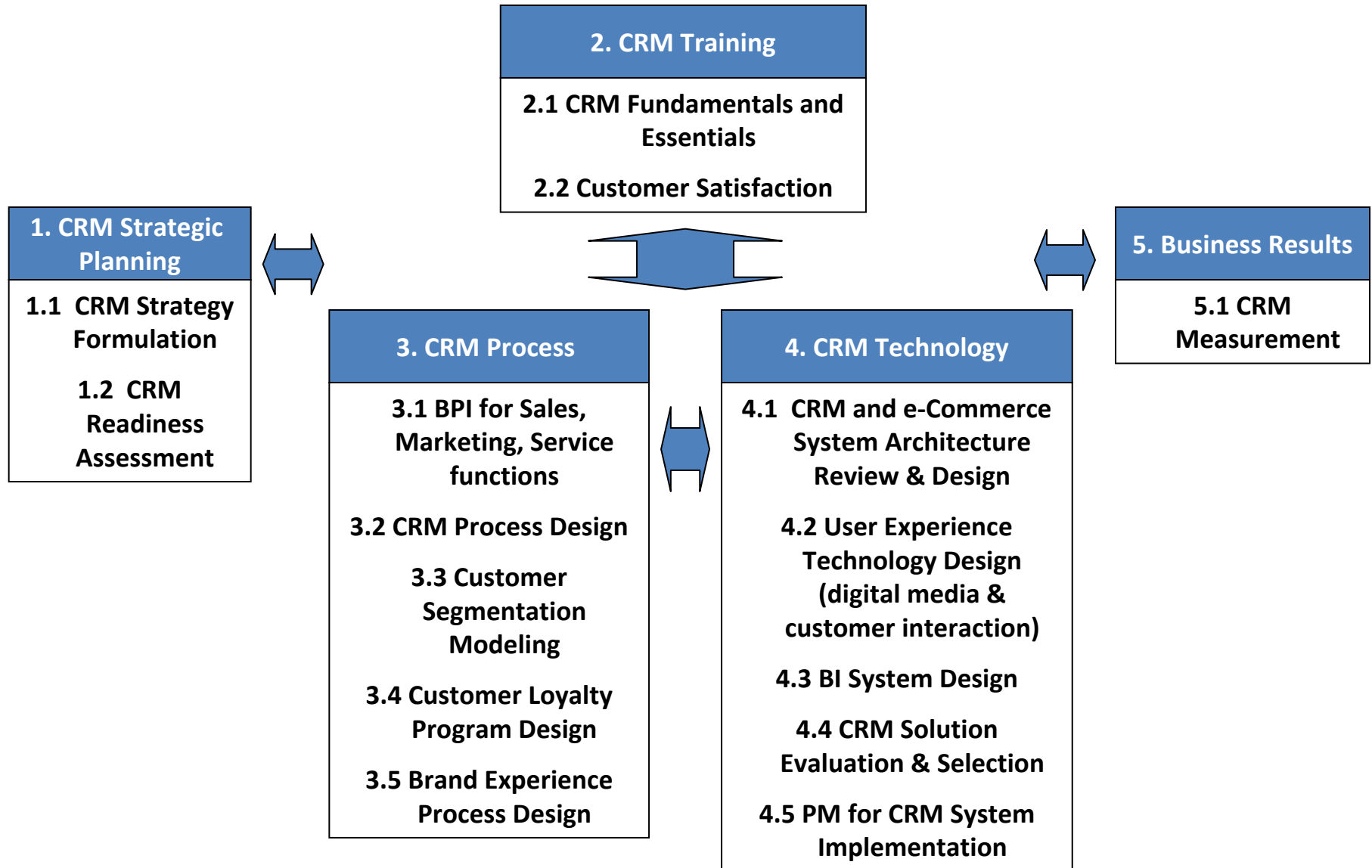


# Speaker Background

- **Consultancy Services**
  - IT Strategy and IT Systems Implementation  
(SaSa, Fairwood, K.Wah, Macau Gov't, Guangzhou Gov't)
  - PLM/ERP Project – BPI, Project Management and QA Service  
(Mattel, Maxim's, Le Saunda)
  - Knowledge Management / CRM  
(Noble Jewellery)
  - CRM / BI System  
(ImagineX Group)
  - Logistics  
(OBTIS, Freight Forwarding System)
  - Open Source Software
- **Event Management / Magazine Distribution**



# 1. CRM Implementation Elements





# 2. Implementation Methodology

## 5. Strategy Deployment Effectiveness

People / Process / System

**5. Review**

### 4a. Process

Customer Taxonomy  
& Segmentation

### 4b. System

Sales, Marketing, &  
Service Automation /  
Business Intelligence  
/ Interactive Media

**4. Implementation**

## 3. Strategic Considerations

Who your customers are?

How to derive value from  
the relationship?

What processes & systems  
to build as enablers?

**3. CRM  
Strategy**

## 1. Value Creation & Proposition

Tangible / Intangible

**1. CRM  
Vision**

### 2a. Current Situation Analysis

Internal:

Business Strategy /  
Positioning /  
System Availability

External:

Market / Competition

**2. Gap Analysis**

### 2b. Contact Point Analysis

People:

Sales / Marketing / Service

Channels:

On-site / Off-site / Online



# 3. CRM Strategy

## 3.1 Retail Industry

What do we want the **SHOPPER** to do differently?

Shop more often?

Buy a different product?

Spend more per purchase?

Try something new?

Get excited about shopping?

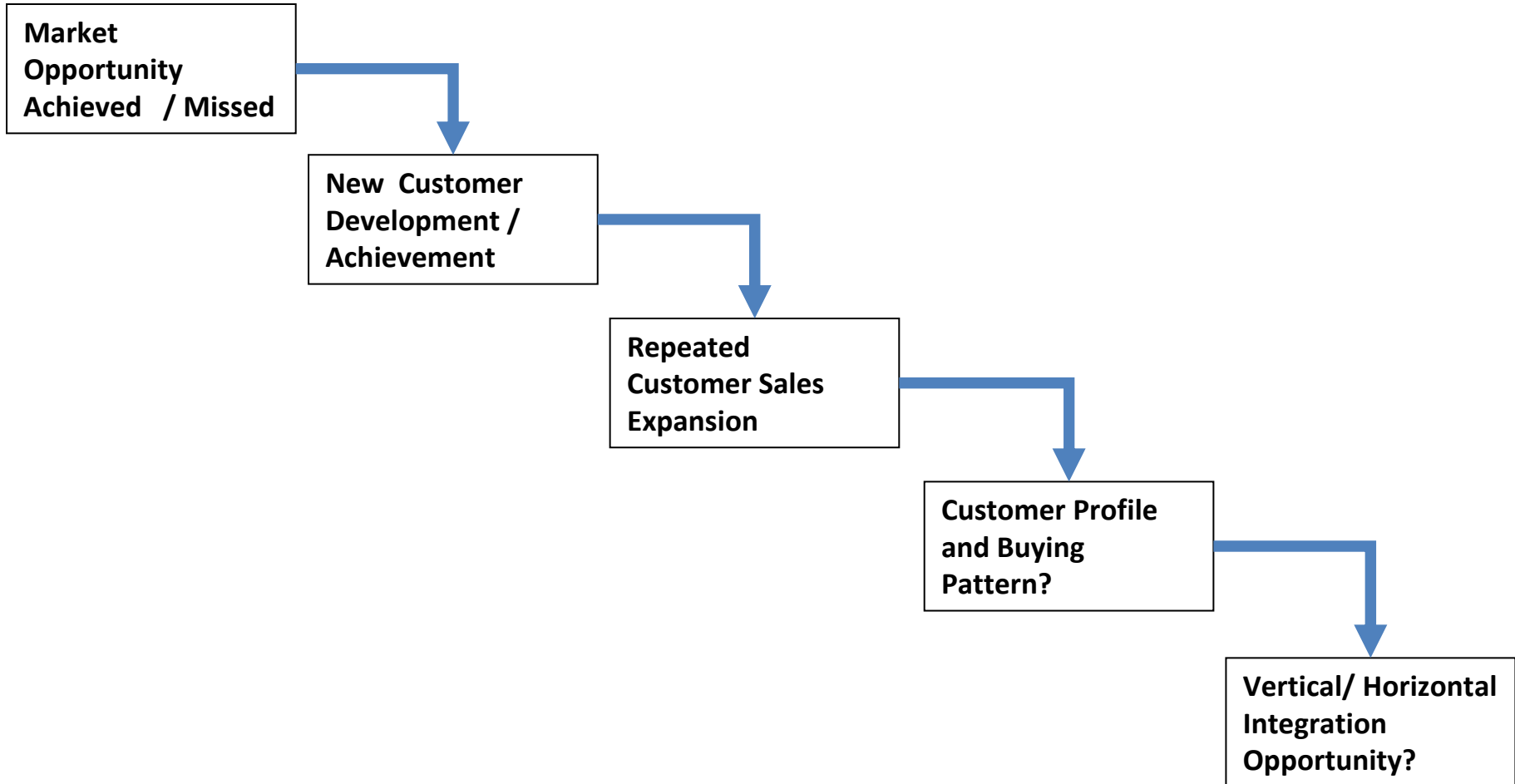
Become more loyal?

Buy more profitable goods?

????????????????????????????????

# 3. CRM Strategy

## 3.2 Manufacturing and Professional Services



### 3. CRM Strategic



STRATEGY TYPES	DESCRIPTION
<b>Trial</b>	The <b>Trial Strategy</b> is a <b>CRM strategy</b> aimed to achieve the first purchase/ consumption (of a Brand/ Product / Company / Category) on the part of a specific target Consumer
<b>Penetration</b>	The <b>Penetration Strategy</b> is a <b>CRM strategy</b> , aimed to develop the number of Consumers <b>who purchase/consume</b> (a Brand / Product / Company / Category) within a specific target
<b>Frequency</b>	The <b>Frequency Strategy</b> is a <b>CRM strategy</b> to encourage Shoppers to purchase the Brand / Product / Category more often
<b>Transaction/Weight of Purchase</b>	The <b>Transaction Strategy</b> is a <b>CRM strategy</b> aimed at increasing the level of purchases/ consumptions of current users (of a Brand/ Product / Company / Category), involving the growth in the Category
<b>Conversion</b>	The <b>Conversion Strategy</b> is specifically aimed at getting Category Buyers to buy more of their purchases in the Partner Retailer. It is appropriate when analysis has shown that Shoppers from the target Segment are shopping in the Retailer but NOT buying the Brand / Product / Category
<b>Retention (Loyalty)</b>	The Customer <b>Retention Strategy</b> is a <b>CRM strategy</b> aimed at developing the level of purchases/ consumption (of a Brand/ Product / Company / Category) over total purchases / consumption on the part of a specific target Consumer ("share of wallet" or "share of requirements")
<b>Profit</b>	The <b>Profit Strategy</b> is a <b>CRM strategy</b> aimed at enhancing the value chain profitability, for both parties. It is appropriate for categories where top line growth is challenging. It is typically delivered by efficiency gains/cost reduction, rather than price increases





## 4. CRM Tactical Options ?

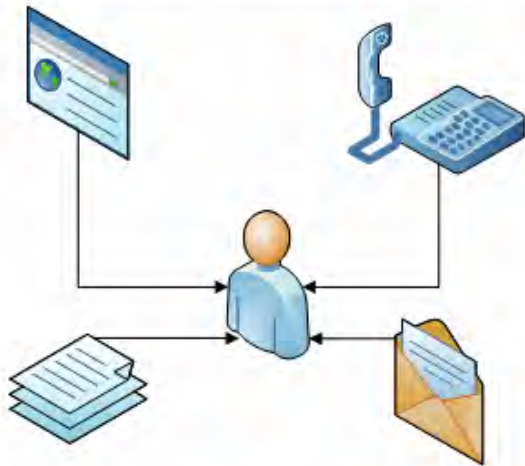
TACTIC	DESCRIPTION
DISCOUNT	▶ Offer to target Consumer of several types of discount as a result of a (usually) purchasing behaviour
POINTS	▶ Offer to target Consumer of several types of points of a collection, as a result of a (usually) purchasing behaviour
SAMPLE	▶ Free offer to target Consumer of a product or a purchase bonus
GIFT	▶ Offer to target Consumer of a gift
SERVICES	▶ Offer to target Consumer of a service
COMMUNICATION/ INFORMATION	▶ Offer to target Consumer of information that is relevant for him/her
CSR	▶ Presentation to target Consumer of the existence of a social initiative and of the opportunity to contribute/participate in it



## 5. Type of CRM Systems

- 通路互動型 (Communicational)
- 作業應用型 (Operational)
- 資料分析型 (Analytical)

通路互動型  
Communicational



作業應用型  
Operational



資料分析型  
Analytical



Business Intelligence



## 6. Case Study



- **Project:** sasa.com e-Commerce Web Portal Implementation
- **Services:** Provide consultancy and quality assurance services on:
  - system architecture and infrastructure design
  - functional design
  - content management design
  - e-Commerce workflow
  - user experience design
  - system performance



## 6. Case Study



- **Project:** CRM System Implementation
- **Services:** Provide consultancy and advisory services on:
  - formulation of objectives and targets of the CRM project
  - validation of CRM needs and requirements
  - evaluation of CRM solutions
  - implementation approach and planning
  - project issues awareness and schedule monitoring
  - quality assurance of system implementation

## 6. Case Study



- **Project:** Customer Knowledge Management
- **Services:** Provide consultancy and advisory services on:
  - Formulation of objectives and targets of the CRM project
  - Validation of CRM needs and requirements
  - CRM BPI and working forms
- **Benefits:**
  - Enable customer strategies deployment
  - Enable centralized and holistic view of customers
  - Enable fast and accurate business decisions
  - Enable speedy and right services to customers
  - Enhance customer retention and profitability
  - Enable co-operations on resources
  - Enrich customer interaction and brand experience

The image features a blue-toned background with a glowing globe. In the foreground, several silhouettes of business professionals are shown. Two individuals in the center are shaking hands, while others stand around them. The text "Thank You!" is overlaid in the center of the image.

**Thank You!**



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