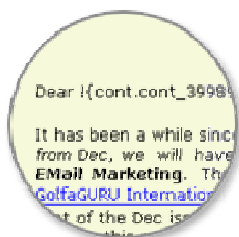


Experience Your First CRM System

5 steps to email marketing for SMEs

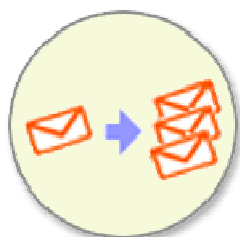
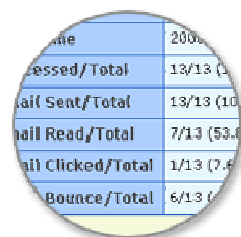


Contact	Title
Kovin Chan	IT Manager
Winnie Fok	Account Manager
Mr. Walder Ip	Sales Manager
Ray Wu	General Manager

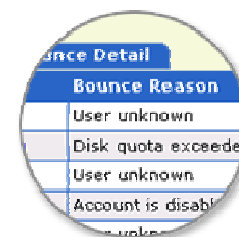


Dear I(cont.cont_3998)

It has been a while since we last spoke. From Dec, we will have **EMail Marketing**. The **GolfaGURU International** is the best of the Dec is...

Delivered/Total	13/13 (100%)
Email Sent/Total	13/13 (100%)
Email Read/Total	7/13 (53.8%)
Email Clicked/Total	1/13 (7.7%)
Bounce/Total	6/13 (46.2%)

Bounce Reason
User unknown
Disk quota exceeded
User unknown
Account is disabled



For your interest in...
address, freeman.chen@freemantel.com
the list. Click the "unsubscribe" link.

UNSUBSCRIBE

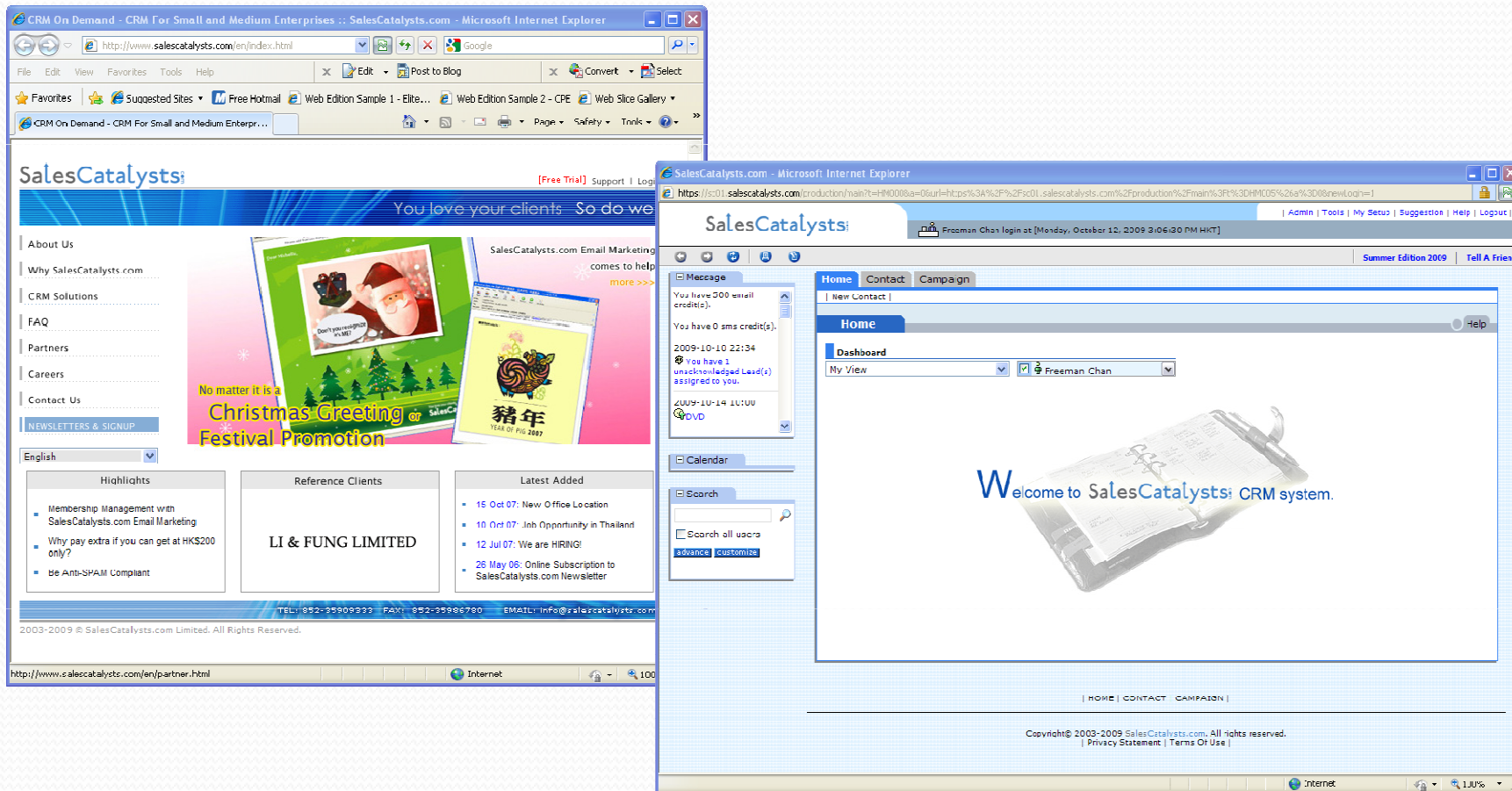
Know some of the brands, know your choices

- Oracle CRM
- Salesforce.com
- Microsoft CRM
- FreeCRM.com
- Vtiger
- SugarCRM
- SalesCatalysts.com

What to look for in your first CRM system?

- **SIMPLICITY:** a simple solution to start with
 - Spend hours to start using but not days to learn
 - Video demonstrations to facilitate self-learning
- **FOUNDATION:** flexibility to build up
 - Platform of modular architecture
 - Web based
- **ECONOMY:** an economic one which minimizes your risk
 - SaaS (Software-as-a-Service)
- **RESULT:** delivers benefits immediately to encourage adoption
 - Focus on revenue generation – sales and marketing
- **SUPPORT:** local support
 - Free local phone & email support, consultants for further development plan

Start our workshop – CRM on Marketing Automation



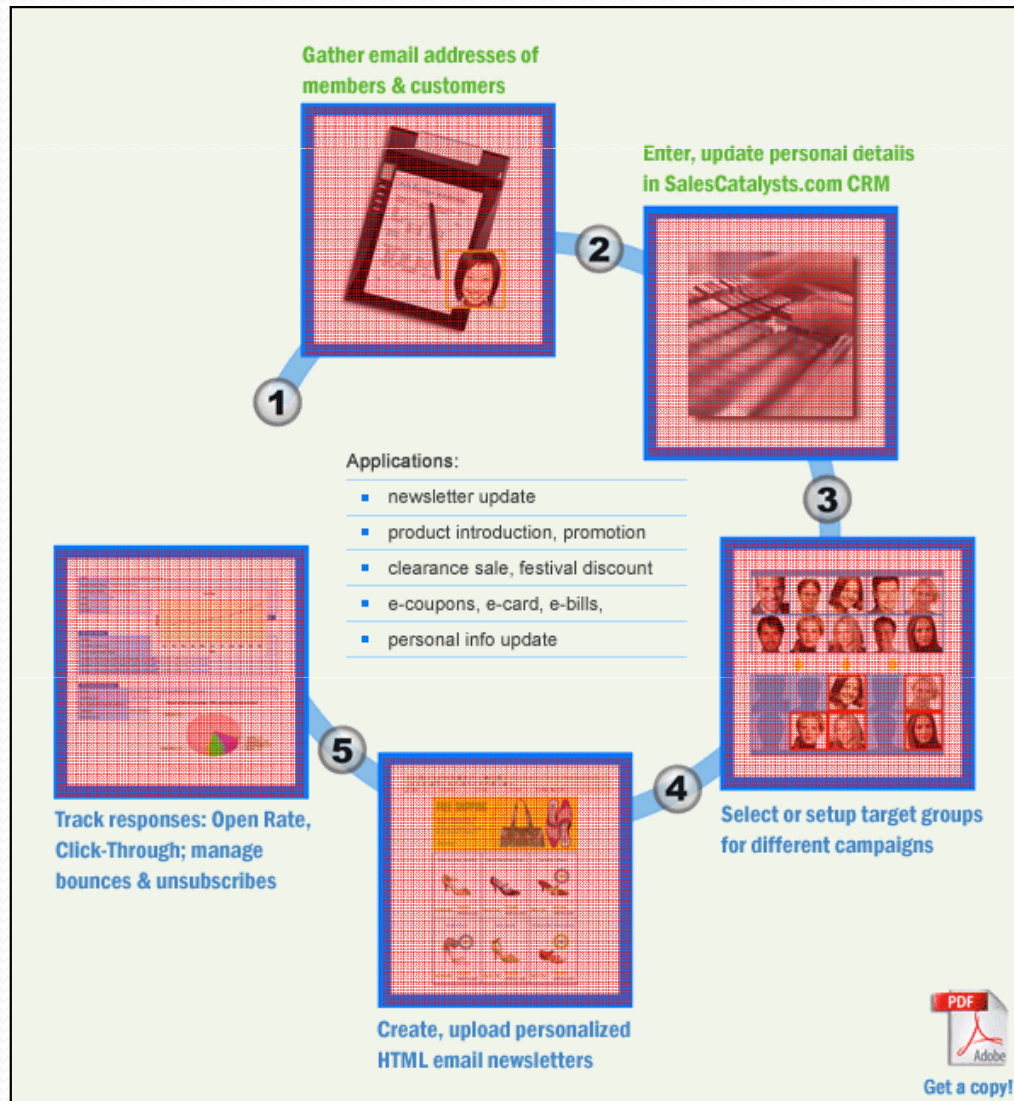
An example CRM solution developed locally: SalesCatalysts.com CRM

Benefits of CRM on Marketing

- Allow data access from multiple colleagues
- More targeted marketing
- Marketing effectiveness reports
- Minimize SPAM mails and complaints
- Minimize the time cost on un-subscription request

Task Status	
Status	Finished
Sending Interval	1 seconds
Start Date Time	2007-12-24 17:28
Number of Email Checked/Number of Email Selected	322/322 (100.0 %) Show Details
Number of Email Not Sent/Number of Email Selected	47/322 (14.6 %) Show Details
Number of Email Sent/Number of Email Selected	275/322 (85.4 %) Show Details
Number of Email Opened/Number of Email Sent	125/275 (45.45 %) Show Details
Number of Email Clicked/Number of Email Sent	5/275 (1.82 %) Show Details
Number of Email Bounced/Number of Email Sent	13/275 (4.73 %) Show Details
Number of Email Forwarded/Number of Email Sent	1/275 (0.36 %) Show Details
Number of Email Unsubscribed/Number of Email Sent	0/275 (0.0 %) Show Details

Solution Design – The Marketing Flow



1. Database Acquisition

2. Manage Contact Profiles

3. Segmentation

4. Message Preparation

5. Launch and Track

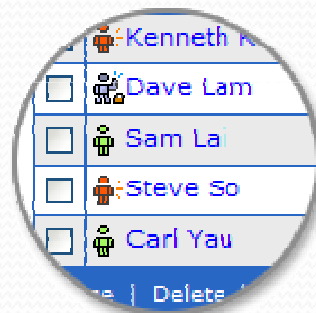
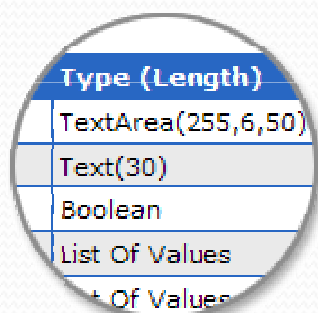
Channels to Build Your Database

- Hong Kong anti-spam regulations: The Unsolicited Electronic Messages Ordinance
- <http://www.ofta.gov.hk/>
- Start from existing database
- Enlarge database through daily operation
- Newsletter opt-in page on your website



Setup and Manage Individual Contact Profile

- Setup profile details
- Maintain an up-to-date contact database
- Export contact database





Live Application Demo

see how these can
be achieved now

SalesCatalysts.com - Microsoft Internet Explorer

https://sc01.salescatalysts.com/production/main?c=HM0008a=0&url=https%3A%2F%2Fsc01.salescatalysts.com%2Fproduction%2Fmain%3F%3D%2FHM0005%26a%3D00newLogin=1

SalesCatalysts: Freeman Chan login at [Monday, October 12, 2009 3:06:30 PM HKT]

Admin | Tools | My Setup | Suggestion | Help | Logout

Summer Edition 2009 Tell A Friend

Home Contact Campaign

New Contact |

Home Help

Dashboard

My View [dropdown] [checked] Freeman Chan [dropdown]

Welcome to SalesCatalysts CRM system.

[HOME] [CONTACT] [CAMPAIGN]

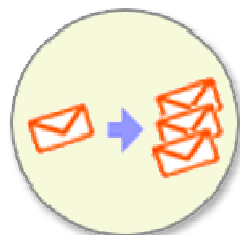
Copyright © 2003-2009 SalesCatalysts.com. All rights reserved.
Privacy Statement | Terms Of Use

Contact List

Contact	Title
Kovin Chan	IT Manager
Winnie Fok	Account Manager
Mr. Walder Ip	Sales Manager
Ray Wu	General Manager

Dear I!(cont.cont_3998)

It has been a while since from Dec, we will have **Email Marketing**. The **GolfaGURU International** is the best of the Dec is...



Delivered/Total	13/13 (100%)
Email Sent/Total	13/13 (100%)
Email Read/Total	7/13 (53.8%)
Email Clicked/Total	1/13 (7.7%)
Bounce/Total	6/13 (46.2%)



Unsubscribe Detail

Bounce Reason
User unknown
Disk quota exceeded
User unknown
Account is disabled

For your interest in... address, **freeman.chan**... the list. Click the "unsubscribe" button.

UNSUBSCRIBE

Login SalesCatalysts.com CRM System

- URL: <http://www.salescatalysts.com>
- User ID: userXX@ticworkshop.com
- Password: ticworkshop

The screenshot displays the SalesCatalysts.com CRM system interface. The top navigation bar includes 'Support' and 'Login' (highlighted with a red box). Below the navigation bar is a blue banner with the text 'You love your clients So do we'. The left sidebar contains navigation links: 'About Us', 'Why SalesCatalysts.com', 'CRM Solutions', 'FAQ', 'Partners', 'Careers', 'Contact Us', and 'NEWSLETTERS & SIGNUP'. The main content area is divided into two sections. The left section is the 'Login' form, which includes a key icon, 'User ID:' and 'Password:' input fields, and a checkbox for 'Remember my User ID on this comp'. The right section is the 'Contact' management interface, showing a 'Contact View' dropdown set to 'Recently Created Contacts' and a 'Contact List' table. The 'Contact List' table has columns for 'Contact Name', 'Company Name', 'Title', 'Home Tel', 'Mobile', 'Hobbies', 'Contact Email', and 'Create Time'. The table contains eight rows of contact data, with the first row highlighted. The bottom of the page shows contact information: 'TEL: 852-35909333 FAX: 852-35986780 EMAIL' and a footer with 'Page 1 of 1 go Record 1 - 8 of 8 show all'.

Support [Login](#)

You love your clients So do we

About Us
Why SalesCatalysts.com
CRM Solutions
FAQ
Partners
Careers
Contact Us
NEWSLETTERS & SIGNUP
English

Home [Contact](#) Campaign

[New Contact](#)

Contact [Help](#)

Login

User ID:
Password:
 Remember my User ID on this comp

Contact View
Recently Created Contacts Sam
Contacts which have been created recently, sorted by Create Time, latest first.

Contact List

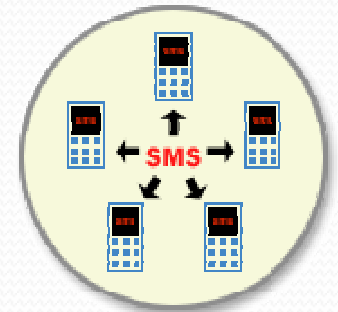
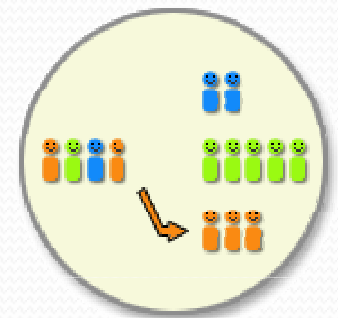
Contact Name	Company Name	Title	Home Tel	Mobile	Hobbies	Contact Email	Create Time	
Mary Wong					Diving, Surfing, Snorkelling,	mary@salescatalysts.com	2009-10-13 21:59	edit delete
Peter Leung					Spa, Canoeing,	peter@salescatalysts.com	2009-10-13 21:59	edit delete
Tom Lee			33336564		Shopping, Auto Racing, Driving,	tom@salescatalysts.com	2009-10-13 21:59	edit delete
Susan Chan					Diving, Football, Flying,	susan@salescatalysts.com	2009-10-13 21:59	edit delete
Jeff Chow					Auto Racing, Golfing, Diving, Driving,	jeff@salescatalysts.com	2009-10-13 21:59	edit delete
Joyce Chan					Golfing, Skiing, Spa,	joyce@salescatalysts.com	2009-10-13 21:59	edit delete
Amy Chan			27578464		Swimming, Shopping,	amy@salescatalysts.com	2009-10-13 21:59	edit delete
Alan Kong			29988454		Shopping, Football	alan@salescatalysts.com	2009-10-13 21:59	edit delete

Merge | Delete | Assign To TIC Workshop User 1

Page 1 of 1 go Record 1 - 8 of 8 show all

Targeted Marketing: Segment Your Database

- Setup various target groups
- Auto-update contact list of target groups



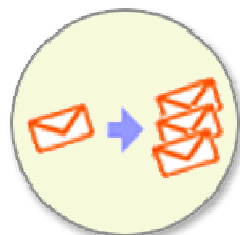


Live Application Demo

see how these can be achieved now

Contact	Title
Kovin Chan	IT Manager
Winnie Fok	Account Manager
Mr. Walder Ip	Sales Manager
Ray Wu	General Manager

Dear I!(cont.cont_3998)
 It has been a while since from Dec, we will have **Email Marketing**. The **GolfaGURU International**...



Delivered/Total	13/13 (100%)
Mail Sent/Total	13/13 (100%)
Mail Read/Total	7/13 (53.8%)
Mail Clicked/Total	1/13 (7.7%)
Bounce/Total	6/13 (46.2%)



Bounce Reason
User unknown
Disk quota exceeded
User unknown
Account is disabled

For your interest in this address, **freeman.chan**...
 the list. Click the "unsubscribe" button.

UNSUBSCRIBE

Targeted Marketing: Segment Your Database

Home | Contact | Campaign

My Setup > Target List Management

Target List Management Help

Target List View

Personal Target Lists Sam

View those target lists accessible by you only.

Personal Target Lists

[All](#) | [A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#) | [W](#) | [X](#) | [Y](#) | [Z](#) | [customize](#)

Name ▲	Records	Create Time	
All Contacts	8	2009-10-14 08:33	edit delete
Married Contacts	4	2009-10-14 11:30	edit delete
Married Men			

Home | Contact | Campaign

My Setup > Target List Management > Edit Target List Help

Edit Target List

Target List Required

Is Public?

Name

Search Criteria For Basic List Required

Records to Display

Criteria [Remove](#)

[More Criteria](#)

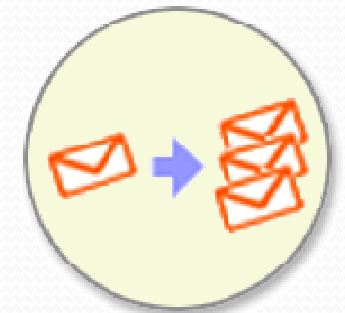
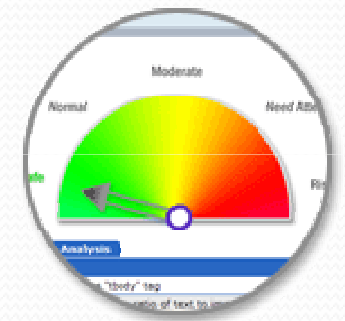
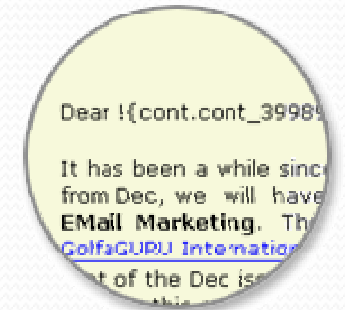
Extract Data from User

Sam

[Save](#) [Save as New Target List](#) [Cancel](#)

Prepare Promotional Emails and SMS

- Avoid misleading Contents
- Build graphical emails and sms in 1 minute
- Keys to campaign message preparation
- Use built-in campaign message editor
- Minimize risk on spam classification



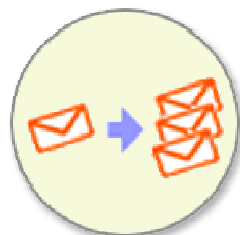


Live Application Demo

see how these can be achieved now

Contact	Title
Kovin Chan	IT Manager
Winnie Fok	Account Manager
Mr. Walder Ip	Sales Manager
Ray Wu	General Manager

Dear I!(cont.cont_3998)
 It has been a while since
 from Dec, we will have
Email Marketing. The
GolfaGURU International
 at of the Dec is



Delivered/Total	13/13 (100%)
Mail Sent/Total	13/13 (100%)
Mail Read/Total	7/13 (53.8%)
Mail Clicked/Total	1/13 (7.7%)
Bounce/Total	6/13 (46.2%)



Bounce Reason
User unknown
Disk quota exceeded
User unknown
Account is disabled

For your interest in
 address, freeman.ch
 the list. Click the "unsub
UNSUBSCRIBE

Prepare Promotional Emails and SMS

The screenshot displays a multi-step process for managing email templates. It starts with a 'Campaign View' showing a list of campaigns, including 'Test Campaign A'. This leads to a 'Manage Template' screen where a list of 'Personal Email Template' items is shown. The 'Club Med Template' is selected for editing. The 'Edit Email Template' screen shows fields for Name, Description, Is Public?, Subject, Online Version (with a link and character encoding), Body Format, and Fields Insertion.

Campaign View

Home | Contact | Campaign

| New Email Campaign | New SMS Campaign | New Target List | New Email Template | New SMS Template | New Contact | Manage Lists | **Manage Template**

Campaign Help

Campaign View

All Email Campaigns | Sam

Email Campaign List

Title	Start Time
Test Campaign A	2009-10-14 12:00

Manage Template Help

Home | Contact | Campaign

Campaign > Manage Template

Manage Template

Template View

Personal Email Template | Sam

Personal Email Template List All | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | customize

Name	Description	Create Time	edit	delete
Club Med Template		2009-10-14 08:43	edit	delete
Sightseers Template		2009-10-14 08:35	edit	delete
Travel Expert		2009-10-14 11:16	edit	delete
Travel Expert Template			edit	delete

Edit Email Template Help

Home | Contact | Campaign

My Setup > Template Management > Edit Email Template

Edit Email Template

Email Template Information Required

Name: Club Med Template

Description: [Text Area]

Is Public?: No

Subject: A momentary escape, a lifetime of memories

Online Version: Link: http://news.clubmed.com.hk/enewsletters/Honeymoon.htm
Character Encoding: Unicode (UTF8) **Load HTML**

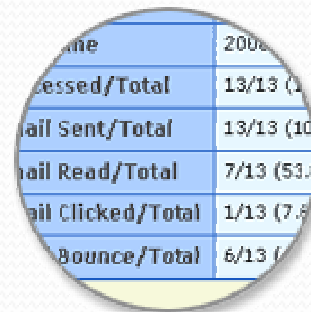
Body Format: HTML

Fields Insertion: Contact | Address 1 | `!{cont.cont_address1}` **Insert Field**

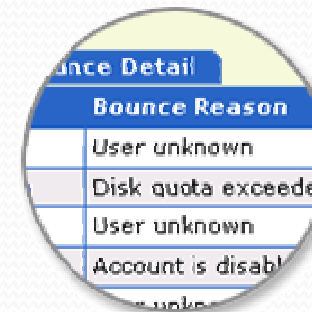
Source | Preview | Spam Analysis | HTML Editor

Launch Your 1st Campaign and Track Response

- Hands on practice on setting up your 1st campaign
- Available campaign reports and result analysis
- Reveal most potential targets, corresponding interests and follow up



Name	2008
Processed/Total	13/13 (100%)
Email Sent/Total	13/13 (100%)
Email Read/Total	7/13 (53.8%)
Email Clicked/Total	1/13 (7.7%)
Bounce/Total	6/13 (46.2%)



Bounce Detail	
Bounce Reason	
User unknown	
Disk quota exceeded	
User unknown	
Account is disabled	
User unknown	



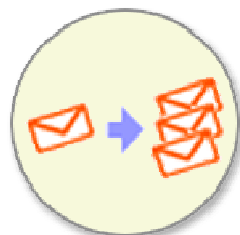


Live Application Demo

see how these can
be achieved now

Contact	Title
Kovin Chan	IT Manager
Winnie Fok	Account Manager
Mr. Walder Ip	Sales Manager
Ray Wu	General Manager

Dear I!(cont.cont_3998)
It has been a while since
from Dec, we will have
Email Marketing. The
GolfGURU International
at of the Dec is



Delivered/Total	13/13 (100%)
Mail Sent/Total	13/13 (100%)
Mail Read/Total	7/13 (53.8%)
Mail Clicked/Total	1/13 (7.7%)
Bounce/Total	6/13 (46.2%)



Bounce Reason
User unknown
Disk quota exceeded
User unknown
Account is disabled

For your interest in
address, freeman.ch
the list. Click the "unsub
UNSUBSCRIBE

Launch Your 1st Campaign and Track Response

Home | Contact | **Campaign**

| New Email Campaign | New SMS Campaign | New Target List | New Email Template | New SMS Template | New Contact | Manage Lists | Manage Template |

Campaign Help

Campaign View

All Email Campaigns Sam

Email Campaign List

Title	Start Time
Test Campaign A	2009-10

Campaign Information Required

Title: Test Campaign on 22 Oct 2009

Details:

Email Information Required

From: Sam Lei <sam.lei@salescatalysts.com>

To: **Personal Target Lists**
All Contacts (8)
Married Contacts (4)
Married Men (1)
Public Target Lists
Married (4)
Married (4) New Target List

Template: N/A New Template

Subject:

Online Version: Load HTML

Body Format:

Header/Footer:

Source Preview HTML Editor

alice chow
E-card 2006 Xmas
E-Card 2007 CNY
E-card 2007 Xmas
E-Card 2008 CNY
E-card 2008 Xmas
E-Card 2009 CNY
SalesCatalysts.com Limited 撥通啓事



Hands on practice – send emails to yourself

Home | Contact | Campaign

| New Contact |

Edit Contact Help

Contact Information Required

Contact Name	Mary Wong	Company Name	
Department		Title	

Home Tel:

Mobile:

Report To: --No selection--

Address 2:

Location: Hong Kong

Airline Preferences: Eva Airlines, British Air

Marital Status: Single

Seat Preference: Isle

Date of Birth: 1975-09-01

Gender: Female

Children:

Edit Profile..

My Setup > Target List Management > Edit Target List

Edit Target List Help

Target List Required

Is Public? No

Name: All Contacts

Search Criteria For Basic List Required

Records to Display: Contact Records

Criteria: AND

Extract Data from User: Sam

Build List..

Home | Contact | Campaign

My Setup > Template Management > Edit Email Template

Edit Email Template Help

Email Template Information Required

Name: Club Med Template

Description:

Is Public? No

Subject: A momentary escape, a lifetime of mem...

Online Version: Link: http://news.clubmed.com.hk/en...
Character Encoding: Unicode (UTF8)

Body Format: HTML

Fields Insertion: Contact | Address 1

Source [Preview](#) [Spam Analysis](#)

Build Template..

Campaign Information Required

Title: Test Campaign on 22 Oct 2009

Email Information Required

From: Sam Lei <sam.lei@salescatalysts.com>

To: **Personal Target Lists** (8)
 All Contacts (8)
 Married Contacts (4)
 Married Men (1)
Public Target Lists
 Married (4)
 Married (4)

Template: N/A

Subject: **Personal Email Template**
 Club Med Template
 Sightseers Template
 Travel Expert
 Travel Expert Template
Public Email Template
 alice chow
 E-card 2006 Xmas
 E-Card 2007 CNY
 E-card 2007 Xmas
 E-Card 2008 CNY
 E-card 2008 Xmas
 E-Card 2009 CNY
 SalesCatalysts.com Limited 樂通客事

HTML Editor

Create Campaign..

Further Questions?

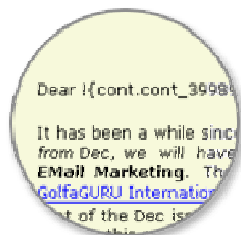
- Visit this training programme website at <http://ssp-ti.hkitf.org/>

中小企活用CRM

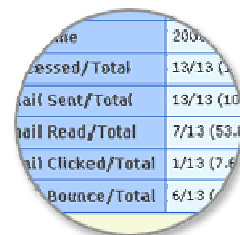
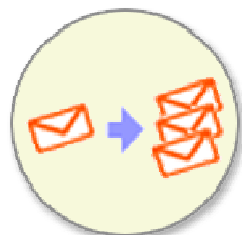
電郵宣傳五步曲



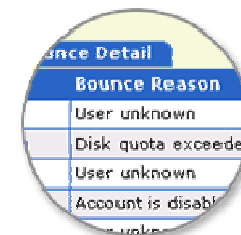
Contact	Title
Kevin Chan	IT Manager
Winnie Fok	Account Manager
Mr. Walder Ip	Sales Manager
Ray Wu	General Manager



Dear I(cont.cont_3998)
It has been a while since
from Dec, we will have
E-Mail Marketing. The
GolfGURU International
of the Dec is



Processed/Total	13/13 (100%)
Mail Sent/Total	13/13 (100%)
Mail Read/Total	7/13 (53.8%)
Mail Clicked/Total	1/13 (7.7%)
Bounce/Total	6/13 (46.2%)



Bounce Reason
User unknown
Disk quota exceeded
User unknown
Account is disabled



For your interest in
address, freeman.ch
the list. Click the "unsubscribe"
UNSUBSCRIBE