



# CLARITAS<sup>TM</sup> CRM for Marketing

## Integrated Mass Marketing Tool

Claritas<sup>TM</sup> lets you plan and execute your mass marketing, all within the same system. You can create professional-looking HTML templates and effortlessly launch email, SMS or mail-merge-based communications. You can use these custom templates for new campaign, or save it future scheduling of recurring campaign activities. Claritas<sup>TM</sup> integrates with various third-party email and SMS gateway, so you can start blasting your personalized marketing material from day one!

## Manage Campaign Life Cycle

CRM transforms your marketing process into an automated workflow. Claritas<sup>TM</sup> enables end-to-end visibility into all marketing detail throughout the entire campaign life cycle. You can collaborate across different teams or business units to maintain standard operating procedure and enhance the consistency. Starting from campaign planning, you can create budget and define campaign type. For execution, you can specify target list and set your mass marketing scheduling. Finally, measuring of statistic and ROI can never be easier. With Claritas<sup>TM</sup>, you are guaranteed complete analytic information that all marketers dreamed of. The insightful management dashboard truly highlights campaign effectiveness and let you drives home the value of marketing program.

**D**eliver impactful marketing campaign and uncover hidden opportunities!

You had a great response from a recent roadshow and receive countless name cards from potential buyers. So what's the next and what you can do with the data? We can help you uncover the hidden opportunities. Leads or prospects, are valuable gold mine and potential source of revenue for your organization. Don't let your perfectly good leads go wasted! Claritas<sup>TM</sup> CRM for marketing is all about how you can discover and transform prospect into paying customer.

**For marketing professionals, nothing is more important than knowing the results from your marketing campaign on various mediums.** Be it through mass mail, web, email or any channels, Claritas<sup>TM</sup> CRM lets you keep track of your leads and opportunities generated from your marketing campaign.

Claritas<sup>TM</sup> CRM provides comprehensive set of campaign management capabilities, including data cleansing and demographic segmentations, allowing marketing team to target their customer accurately. You can track leads and sources, route leads to the right sales people in real time, and provide the analytics to see what's working and what can be improved. The powerful analytics helps you to evaluate your campaign effectiveness and how to improve for future marketing activities.



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# CLARITAS<sup>TM</sup> CRM *for* Marketing

## ● Spend More Time With Right Customer

Claritas<sup>TM</sup> lets you manage lead information from the very beginning of business cycle. After all, CRM for marketing is about distinguish new prospects, promote leads and qualify opportunities. You can record all relevant activities, relate information to customer and classify them into various statuses or categories. Along the journey, you will obtain improved data accuracy by having system to detect and merge duplicate records. As a result, you can easily perform customer segmentation based on demographic filtering, generate quality target list and pinpoint audience group for cross-selling, up-selling or any marketing means. With Claritas<sup>TM</sup>, we help you to get your marketing mix right by telling you which of your marketing channel is the most effective or yield the best result. There is no doubt that you can observe phenomenal improvement to your organization's lead handling process.



Claritas<sup>TM</sup> CRM transforms your traditional marketing process into an automated workflow. It is a tool to centralize tracking of leads and campaigns information, making data collaboration & sharing across your organization seems so simple. In short, Claritas<sup>TM</sup> CRM for Marketing enables you to spend more time with the right customer.

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## ■ Track Response and Monitor Results

You can't manage it unless you can measure it. Once you have planned and executed your campaign, you can immediately keep track of campaign responses such as total target audience, total sent, received, click-through and bounced. System automatically suppresses duplicate contact and prevents spamming of same email or SMS. Recipient can conveniently opt-out from future mass marketing communications. Claritas<sup>TM</sup> lets you qualify leads, convert leads into contact and create opportunities with no more than a few clicks. We inform you on the overall campaign result so that you can conveniently monitor on key performance indicators such as campaign ROI, statistic and cost per response.

## ■ Transform Past Data into Marketing Intelligence

Have you ever wonder how much data you can garner from a campaign that your team just did? This is called marketing intelligence. All historical marketing data in the system can be used as benchmark and serve as marketing intelligence to help you improve future campaign effectiveness and precision. We identify spending pattern so that you can introduce new product to right market. We analyze trends so that your company responds quickly to changing customer preferences and emerging market opportunities. We provide 360 marketing reports so that you don't missed out critical opportunity windows. Thanks to deep analytics, you gain a clear view of your prospect with access to detail segmentation and demographic information. Adopt Claritas<sup>TM</sup> and your marketing result will never be the same again.



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Powering your daily sales activities with sales force automation!



# CLARITAS<sup>TM</sup> CRM for Sales

## Manage Sales Pipeline

With Claritas<sup>TM</sup> CRM, you have the entire sales pipeline and related sales activity at your grasp. We tailor the system to match your organization needs for cutting down paperwork and improve sales follow up process. You can manage your sales collaboration and establish consistent follow up process with out-of-the-box feature on sales appointment, client meeting, call enquiry and follow task. You are guaranteed insight into leads and opportunities at every stage of the sales cycle.

Are you managing your accounts effectively? Do you know what your sales representative is doing? How is your sales team performing against forecast? These are common pitfall of a sales organization and sales automation system is the solution. Claritas<sup>TM</sup> CRM helps you shorter sales cycle, increase conversion rate and improve customer retention.

**Harness lead into opportunities, and converting them into your customers! Claritas<sup>TM</sup> CRM provides you the perfect sales force system to track your sales activities and forecast sales pipeline.** Sales team loves Claritas<sup>TM</sup> CRM because they got a central place to manage sales-related activities. And because Claritas<sup>TM</sup> is on the cloud, everyone can access the data with just an Internet connection – who says business application require expensive hardware and software? Suddenly, they are spending less time on administration and more time on closing deals.



## Turn Lead Into Opportunity

The opportunity management module, combined with automated workflow such as lead routing, regular sales update and competitor tracking, can shorten overall sales cycle and process. Claritas<sup>TM</sup> CRM empowers your sales team everything they need to efficiently manage opportunities and quotation throughout the entire sales cycle, By analyzing into past sales history, Claritas<sup>TM</sup> lets you spend more time focusing on closing with the right customers, hence improve your sales qualification and win rate.



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# CLARITAS™ CRM for Sales



## Increase Sales Success: Keeping Track of Customers and Competitors

Inadequate knowledge about a customer's information creates a short-fall when trying to close a deal. Don't ever go knock on client's door for more orders when you know you have a pending issue need to be solved. Claritas™ gives you 360° view on client organization's key stakeholders, case history, past purchases, quotation revisions, competitor listing and more. You can maintain detailed information on competitors associated with particular opportunities. You can also track customer activities by product, region or other criteria. And at the end of the day, you can look into sales viability to forecast sales, identify trends or problems, measure business performance and sales success.

## Integrated Quotation Module

Claritas™ lets you create simple quotation and manage quotation revision, within you CRM application. The system lets you browse through product catalog and include in quotation. You can specify recommended pricing within the product catalog so that you can be sure that your sales team provides accurate costing and maintain consistent quotation to customers. Sales manager can perform quote revisions by adjusting discount on grand total or item level.

## Benchmark Sales against Forecast

You can easily tabulate sales target top down for a sales team; or roll up sales commitment from individual sales executive. Either way, the flexible analytic tools lets every sales representative access to their own targets, plan & execute sales strategy, and keep track of their sales pipeline. Claritas™ establish clear dashboard and indicators for every person to measure their own success by comparing sales target vs. actual sales. For managers, the system gives real-time visibility into their team's activities; hence able to forecast sales with confidence. In short, Claritas™ effectively bridge the gap between what is committed and what is achieved.



Claritas™ lets you have a centralized sales collaboration tool to keep track of customer sales data, from multiple branches or time zones. With the sales force automation solution, you practically have all customer information at your fingertips and definitely gain a competitive advantage when comes to competing for global deals. After all, CRM is about serving better value to customer and boosting customer confidence. Trust Claritas™ and improve your sales now!

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# Boost Service Effectiveness and Increase Customer Satisfaction!

# CLARITAS™ CRM for Support

Today, customer demands uncompromised speed and responsive services across every channel from call center to email and social web. With Claritas™ CRM for Support, you will deliver it all under one integrated platform. We have everything you need to amaze your customer and keep your support team productive.

## Automate Your Support Processes

We revolutionize your customer support experience into a robust service process with features spanning across case routing, queuing, assignment, escalation and notification. System lets you keep track of customer complaints from various channels and sources. Feedbacks coming in from website, emails and calls; can be automatically created as a case to yield greater consistency. You can configure business rules for queue management and case auto-assignment based on type, priority or source. All email correspondence between staff and customer are logged within the case for traceability in the event case ownership transfer. Built-in workflow such as new case notification, customer satisfaction survey form, deadline reminder and overdue escalation, are part of the overall features helping you to increase effectiveness and standardizing support activities.



## Track Service Level Systematically

Claritas™ supports multi-task escalation across business units with custom SLA (service level agreement). The feature of multi-issue escalation within a single case lets your measure internal KPI and external KPI independently. You can evaluate agent productivity by tracking the issue turnaround time; while the case aging report tells you how well you are delivering as per committed SLA. System lets you define holiday settings and custom work schedule, so that SLA for cases coming in during non-working day or outside office hour gets calculated accurately. Our success stories shows that organizations have benefited with 27% increase in customer satisfaction – by ensuring your SLA commitment to your client is met!



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# Boost Service Effectiveness and Increase Customer Satisfaction!

# CLARITAS<sup>TM</sup> CRM *for* Support

## Service and Contract Management

Claritas<sup>TM</sup> has the ability to track and monitor the service efficiency of your accounts, products and contracts. You can create job sheet or task calendar to keep track of field-based worker / technician deployed; and associate them to customer cases. If you are relying on third party vendor to deliver the services, you can transform Claritas<sup>TM</sup> CRM into facility management to monitor your supplier, ensuring they are delivering up to their service level promises. Contract management module is also included where you can add, edit and track contracts associated with products and companies. You can easily check on maintenance contract validity before deploying your service team; and create renewal reminder or expiry notification for account managers and customers.

## Turn Experience into Knowledge Base

Transform customer feedbacks into clear and actionable knowledge! With the historical case and issue data, you can harvest deep into it and identify common support issues to establish solution base. Knowledge base can be used to speed up resolution time for similar problem in future. Claritas<sup>TM</sup> CRM expertly advises on troubleshooting steps and solution options based on category or product type. Supervisor can define best known methods in knowledge base and use it as document repository to train up new support staff.

Business support automation lets you provide the level of service that customer desire; and maintain the consistency that keeps agent at optimal performance. Streamlined process goes a long way in helping you resolve issues quickly and accurately, boosting both service effectiveness and customer satisfaction. Retaining customers and forming long-term customer relationship is the most important factor when comes to implementing a CRM solutions, and Claritas<sup>TM</sup> with its support & service management features, certainly lives up to its expectation - **Helping You to Care for Your Customer!**



## Customer Self Help

With Claritas<sup>TM</sup>, you can provide a 24x7 customer self-service portal to increase convenience for your customer to update personal profile, check status, create cases and find answers. It serves as the platform to enhance your customer experience. Your support team can keep in touch with customers at all time, ensuring that no single case is left out, or left too long without proper solution. It is quick to deploy, easy to manage and help you to keep your support cost under control.

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**Defining  
Communications  
Excellence!**



# CLARITAS™ *for* Contact Centre

## Real-Time Call Monitoring

Historical information is simply not sufficient. The solution provides real-time statistics on inbound and outbound calls, hence assisting management in making critical decisions. It provides valuable information on how many calls received, made, abandoned, and waiting (in-queue); how many staff available to answer calls and average call handling time – directly to your desktop. Individual agent can also view their own call handling statistics and call list on incoming, abandoned, outgoing calls. This real-time data allows team lead to gauge the efficiency of their team and establish baseline performance numbers. These calls handling information can also be displayed on a wallboard to encourage responsibility, enforce accountability and creates motivational values.

### Does any of these sound familiar?

- No idea how many calls your business received yesterday?
- No idea how many calls your business missed yesterday?
- No idea how much business you lost?
- No idea how long customers have to wait before they're actually answered?
- Ever missed that vital piece of information during a call and wished it was recorded?

**If yes, Claritas™ is your answer!**

In competitive business environment, you need to be able to communicate with your customers using a variety of channels, including voice, text, email and web chat. Is your contact center ready to capture these interactions? How will you monitor and manage quality, training, performance and compliance?

Monitoring call traffic in real-time means we can respond quickly to busy periods. It improves the customer perception of your organization. Telephone responses can now be measured with precision. Costly dispute can now be solved instantly. Claritas™ Contact Centre Solution (CCS) is a complete call management system featuring capabilities such as call monitoring, call center management, call recording and call activity analysis. We take real time call management to the ultimate level with its ability to translate real time call data into management dashboard for call performance monitoring. And because all these happen in real time, you can quickly respond to business need and changing conditions.



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# CLARITAS<sup>TM</sup> CRM *for* Contact Centre

## Interactive Voice Response (IVR)

IVR inter-connects telephones, computer database, faxes and customers in powerful ways. IVR can integrate with CRM application to support various call-flow requirements. We enables telephony systems the intelligence to answer a caller's questions. Customer can call and receive answers to their questions. Any information stored in database can be spoken to customer, in variety of installed languages. As a result, contact center increases overall productivity while improving overall customer experience.



## Computer Telephone Integration (CTI)

Claritas<sup>TM</sup> CCS lets you confidently build and deploy world-class contact center through integration with leading technologies on telephony switch, automated call distribution (ACD) and voice recording products. Combining various technologies, you have a completely integrated system that not only consists of inbound and outbound solution, but also value-added functionality on quality monitoring, interactive voice responder (IVR) and speech analytics. You can have screen pops accompanying incoming calls, to display contact information from CRM database. You can have call recording tagged to cases to help resolve disputes and aid staff training. You can search contact address book from CRM and speed dial from application. Most PABX also allows triggering of call control manager features such as dial, answer, hold, park, conference, set forwards, call back and DND from your software interface. With CTI, the call center experience will never be the same again.

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**Defining  
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# CLARITAS<sup>TM</sup> CRM *for* Contact Centre

## Workforce Management Made Easy

Claritas<sup>TM</sup> CCS represents a solution for managing and optimizing contact center workforce. It helps improve resource performance and retention by providing unprecedented 360° visibility into business processes and agent productivity. Customer satisfaction can be measured at every stage of the service life cycle. Call center manager may login anytime to see summary reports of system statistics, hot issues and agent solutions. Team lead may use historical and predictive analytics to help reduce case handling times and improve first-call resolution. And finally, by consolidating call data from multiple ACD or branches, your CEO will be delighted to see a dashboard that keeps him up-to-date on customer service performance of his global organization, real-time.

## Resolve Cases Quickly and With Precision

System enables fast and accurate resolution of customer incidents by giving agents access to all needed information about customers, products, history and cases through a single user interface. Organized solutions & answers are simply easy to find and instantly available for sharing internally and externally. Junior staff or new agents are able to respond to repetitive questions by applying previously written knowledge base. Ultimately, this raises resource efficiency and call center effectiveness.

Claritas<sup>TM</sup> CRM for Contact Center undeniably gives you an easy-to-use tool to deliver consistent and efficient service that enhances customer loyalty to sustain long-term business and increase lifetime value. It is completely customizable to suit your business processes and scale to meet your enterprise demands.

## Managed By Exception

Top management often practices Management by Exception policy and devotes time to investigate situation that deters from expected result. Built-in workflows such as critical issue notification, deadline reminder and overdue escalation, are all part of the overall capabilities, to assist call center manager to highlight potential problem fast, saving company from huge fortune from loss of business. Team supervisor can instantaneously zoom into cases that trigger alarms and spend valuable time concentrating on monitoring calls exceeds threshold limit alert.



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# CLARITAS<sup>TM</sup> CRM for Loyalty Program

## Bring Your Brand And Your Customer CLOSER!



Loyalty Program is a strategic marketing approach where company focuses on customer growth and retention through rewards and incentive. One should not underestimate the powerful effect of loyalty marketing - it is an important process to generate recurring revenue and maintain brand loyalty. And this is exactly where Claritas<sup>TM</sup> CRM can expertly lend you a hand.

### Membership Program

Claritas<sup>TM</sup> comes with complete membership module that supports both customer self-signup and manual registration. On creation, you can capture mandatory customer information (e.g.: name, contact, email and more) and optional demographic information (e.g.: birth date, occupation, salary range and more). You can also categorize your membership into multi-tier classifications such as normal, silver and gold. More membership handling features include:

- Integrated card printing
- Temporary card issuance
- Card promotion, termination & expiration
- Principal / sub-card (combined points)
- Referral program (member-get-member scheme)

### Point Management

The point management module lets you specify how your customer can collect points and redeem rewards. You can design your unique point rules by brand, product and member type. You can readily apply the following point calculation mechanism:

- Tier-based Points (Normal: 1X; Gold: 2X)
- Base + Promo Points
- Special Occasion Bonus Points
- New Member Bonus Points
- Recurring Visit Bonus Points

System can generate point statements, displaying active and expiring points. In the event of discrepancy, authorized administration can perform point transfer, point adjustment or manual reconciliation.

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# CLARITAS<sup>TM</sup> CRM *for* Loyalty Program

## Bring Your Brand And Your Customer CLOSER!

### Specify Redemption Rules

Be it online or offline redemption, Claritas<sup>TM</sup> lets you tailor redemption logics just the way you want it. You can choose the following redemption mechanism or combine any these rules to associate with specific reward item.

- By points or %
- Fast track (points + cash)
- Slash point promotion
- Add-on delivery charge

Points will be automatically deducted upon successful redemption. If required, you can also incorporate refund and exchange policy into the system.

### Customize Your Reward Catalog

With Claritas<sup>TM</sup>, you can manage your product catalog within the system. We let you create multi-tier product hierarchy and category on reward items. You can specify unit price with applicable point and redemption rules. If your organization has an E-Commerce storefront, you can conveniently publish the reward catalog online. Claritas<sup>TM</sup> is built-in with a simple shopping cart capability for searching product, add to cart, redeem reward and perform checkout.

### Analyze Demographic & Perform Segmentation

Tucked deep inside CRM data-warehouse are mountains of useful data and transactions. Claritas<sup>TM</sup> data mining tool lets you drill deep into them and uncover hidden trends that are potentially useful for enhancing customer loyalty. We create a centralized, customizable view of your customer's preferences, relationships and activity history. Using the holistic 360° view, you can segment customers by their demographic profiles and spot purchase trends as they develop. You can perform various analytics to better understand your customer, anticipate their future needs and make effective cross-selling and up-selling offers.



### Identify Patterns & Make Right Offers

Claritas<sup>TM</sup> helps you understand your customer better. You can effortlessly track all interactions, offers, orders, contracts, and relationships associated with your account, enabling you to offer right product or service, to right people, at the right time. Whenever appropriate, you can proactively suggest replacements or renewals, or simply reward frequent customers. For effective cross-selling, the built-in wizard-driven mass marketing tool lets you introduce new products efficiently to your customers, keeping them informed on new product and service offerings.

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# CLARITAS<sup>TM</sup> CRM for Loyalty Program

Bring Your **Brand**  
And Your **Customer**  
**CLOSER!**

## Integrate with POS & E-Commerce

Whether you are operating an online business; or a retail store-front, chances are you are relying heavily on CRM to manage your loyalty program and analyze your customer spending patterns. Thus, integrating your POS with CRM is important to help you keep up-to-date on what your customer are doing, real-time. Claritas<sup>TM</sup> lets you have a consolidated platform that retrieves sales transactions from all outlets and perform extra data massaging on point calculation and brand analytics. And depending on your business needs, Claritas<sup>TM</sup> offers the ability to do real-time integrations or batch update.



## Customer Online Portal

Your loyalty program is not complete without customer online portal. Claritas<sup>TM</sup> has all the information you need to create a feature-rich E-commerce platform that will surely bring your customer experience to the next level. Your customer web front-end can be customized to support the following functions:

- Self-signup & registration
- View & update personal data
- View history & recent transactions
- View point statement (active & expiring points)
- View & download online catalog
- Make online redemption
- Purchase & transfer points
- Submit feedback form

Building customer loyalty is not an overnight process and implementing a CRM solution goes a long way in helping you to enhance brand awareness and customer satisfaction. Start adopting Claritas<sup>TM</sup> today and find out how we can help you translate loyalty into money!

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# CLARITAS<sup>TM</sup> CRM

## Features

### General

- Secure web authentication
- Customizable login screen & URL redirection
- Print, import & export function
- Account & branch management
- Contact management (customer, partner, competitor etc.)

### Marketing

- Marketing automation
- Manage leads & prospects
- Develop campaign
- Account & branch management
- Mass email marketing with tracker status
- Customer segmentation & demographic filtering
- Cross-selling & up-selling
- Lead auto-creation (web form-to-lead)

### Sales

- Sales force automation
- Manage sales opportunities
- Tracking of sales pipeline viability
- Lead conversion
- 360 view on brand, product, contract & quotation
- Sales forecasting

### Collaboration

- Meeting scheduling
- Call appointment tracking
- Task assignment
- Note & attachment
- Email management

### Management

- Dashboard for CEO / Top Management
- Dashboard for Marketing Manager
- Dashboard for Sales Manager
- Dashboard for Support Manager

### Support

- Case management
- Issue management for multi assignment
- Issue Escalation
- Internal SLA (staff) & external SLA (customer)
- Product & asset management
- Contract management
- Multi-dimensional knowledge base collaboration
- Integrated knowledge base with suggested solutions
- Case history tracking
- Case source tracking
- Case auto-creation (web form-to-case)
- Case auto-creation (email-to-case)
- Case workflow: routing & auto-assignment
- Case workflow: email auto-response
- Case workflow: escalation & notification rules

### Reporting

- Multi-dimension views & reports
- Marketing reports to measure campaign effectiveness
- Sales reports to measure sales conversion & viability
- Service reports to measure customer satisfaction

### Administrations

- User & role management
- Module & field level access control
- Customizable interface layout & views
- Product catalog management
- Email template management
- Holidays & non-work day setting
- Work schedule & business hour setting
- Pick list item maintenance
- Service level agreement (SLA) configuration
- Document running number maintenance
- Audit trail tracking