



VITAL CRM

Tags



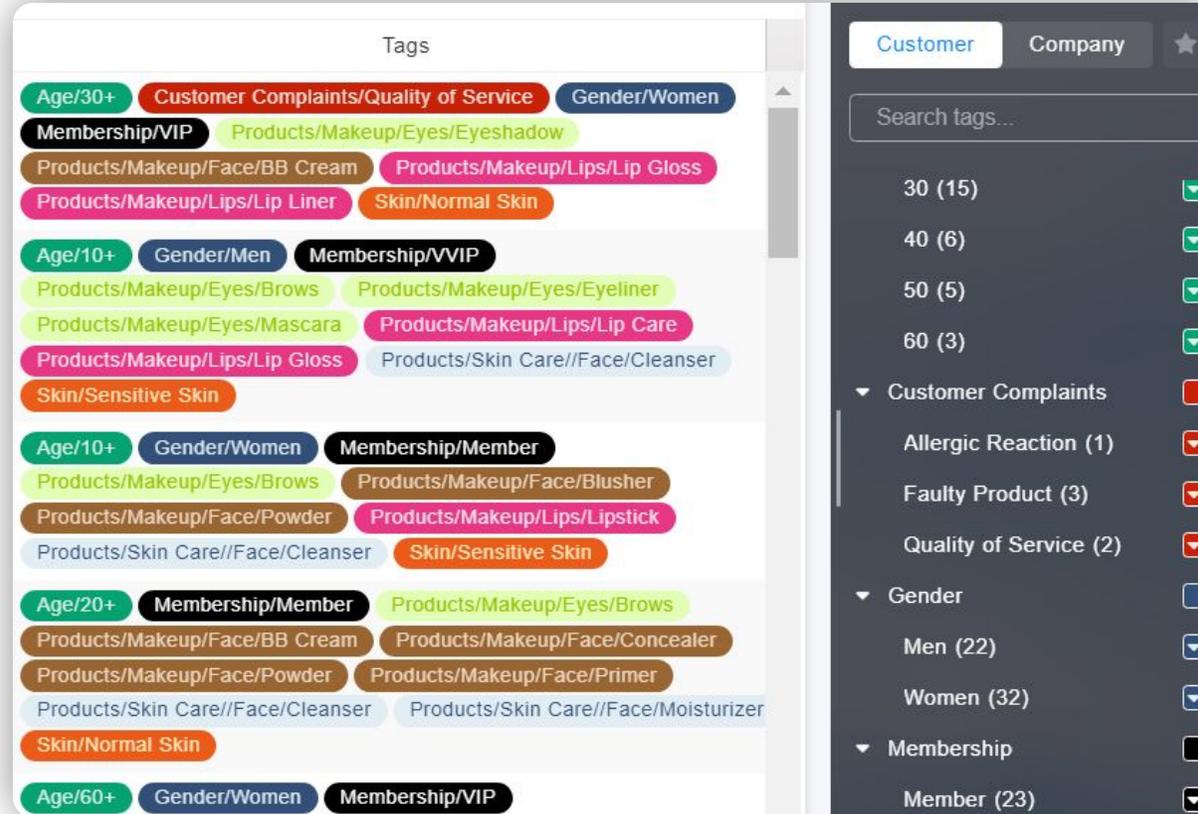
■ The 80/20 Rule

80% of a company's annual revenue comes from 20% of its customers.

Who are your key customers?



Tags-Focus Marketing

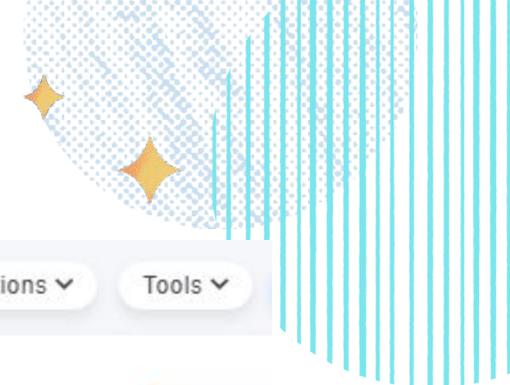


The screenshot displays the 'Tags' management interface in Vital CRM. The main area shows a list of individual tags for customers, such as 'Age/30+', 'Customer Complaints/Quality of Service', and 'Gender/Women'. The right sidebar provides a summary of tag groups, including 'Customer' (with sub-groups like '30 (15)', '40 (6)', '50 (5)', '60 (3)', 'Customer Complaints', 'Allergic Reaction (1)', 'Faulty Product (3)', 'Quality of Service (2)') and 'Gender' (with sub-groups 'Men (22)', 'Women (32)').

- Apply various characteristic tags to customers without the need to type keywords to search for customers. Utilize tag groups to easily achieve precision marketing.

Tagging Delete Merge Search by First Alphabet Display Fields

	Name	Social ...	Company	Mobile Phone	Landline Nu...	Tags
<input type="checkbox"/>	<input type="checkbox"/> AOO			0930*****		Age/30+ Customer Complaints/Quality of Service Gender/Women Membership/VIP Products/Makeup/Eyes/Eyeshadow Products/Makeup/Face/BB Cream Products/Makeup/Lips/Lip Gloss Products/Makeup/Lips/Lip Liner Skin/Normal Skin
<input type="checkbox"/>	<input type="checkbox"/> AOO			0937*****		Age/10+ Gender/Men Membership/VVIP Products/Makeup/Eyes/Brows Products/Makeup/Eyes/Eyeliners Products/Makeup/Eyes/Mascara Products/Makeup/Lips/Lip Care Products/Makeup/Lips/Lip Gloss Products/Skin Care//Face/Cleanser Skin/Sensitive Skin
<input type="checkbox"/>	<input type="checkbox"/> AOO			0955*****		Age/10+ Gender/Women Membership/Member Products/Makeup/Eyes/Brows Products/Makeup/Face/Blusher Products/Makeup/Face/Powder Products/Makeup/Lips/Lipstick Products/Skin Care//Face/Cleanser Skin/Sensitive Skin
<input type="checkbox"/>	<input type="checkbox"/> AOO			0968*****		Age/20+ Membership/Member Products/Makeup/Eyes/Brows Products/Makeup/Face/BB Cream Products/Makeup/Face/Concealer Products/Makeup/Face/Powder Products/Makeup/Face/Primer Products/Skin Care//Face/Cleanser Products/Skin Care//Face/Moisturizer Skin/Normal Skin



Customer Membership/VIP X Import Functions ▾ Tools ▾

Full Name Created Date Relative Created Date Created in the Last day(s) Search

Days not Contacted Customer has not been Contacted in the Last day(s) More Criteria ▾

Customer List Total 11 items / 1 pages

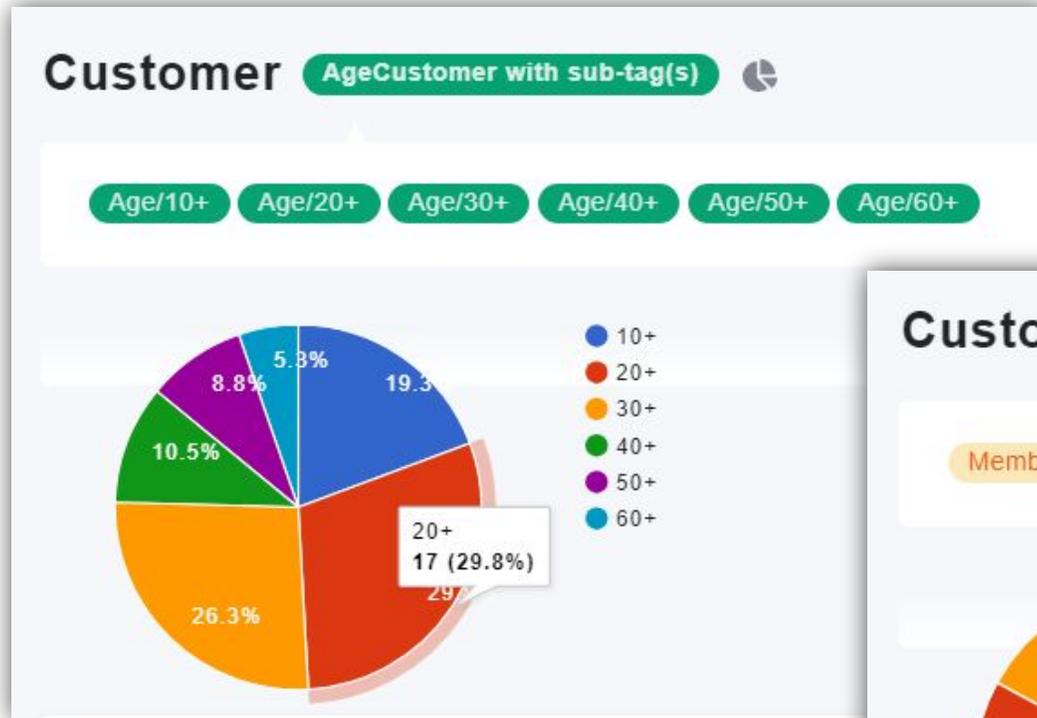
Tagging Delete Merge Search by First Alphabet Display Fields

<input type="checkbox"/>	Name	Social ...	Company	Mobile Phone	Landline Nu...	Tags
<input type="checkbox"/>	AOO			0930*****		Membership/VIP Age/30+ Customer Complaints/Quality of Service Gender/women Products/Makeup/Eyes/Eyeshadow Products/Makeup/Face/BB Cream Products/Makeup/Lips/Lip Gloss Products/Makeup/Lips/Lip Liner Skin/Normal Skin
<input type="checkbox"/>	AOO			0926*****		Membership/VIP Age/60+ Gender/Women Products/Makeup/Lips/Lipstick Products/Skin Care//Body/Body Lotion Products/Skin Care//Face/Anti Aging Products/Skin Care//Face/Mask Products/Skin Care//Face/Moisturizer Skin/Mature Skin
<input type="checkbox"/>	GOO			0975*****		Membership/VIP Age/20+ Products/Makeup/Face/BB Cream Products/Makeup/Face/Blusher Products/Makeup/Face/Bronzer Products/Makeup/Face/Highlighter Products/Skin Care//Face/Cleanser Products/Skin Care//Face/Moisturizer Products/Skin Care//Face/Toner Skin/Sensitive Skin

VIP
Customer



- Graphic Analysis of customer attributes



Purchases Find Customer without Order.

Previously Purchased [+Add](#) **Purchase Behavior**
Brightening Toner [×](#)

Never Purchased [+Add](#) **Filter according to purchase amount**

Order within

Order within Last days

Total Number of Orders

Total Amount

- Quickly select target customers based on purchasing behavior, consumption amount, etc.

Full Name Created Date Relative Created Date Created in the Last day(s) Days not Contacted Customer has not been Contacted in the Last day(s)

Tags

- Multiple Tags [+ Add](#)
- One of the tags [+ Add](#)
- Tags Excluded [+ Add](#)

Customer Information

Gender Age ~ Nationality Has at Least Relatives and Friends External ID

- Export Excel File
- Print Mailing Labels
- Send Email
- Add Tag(s)
- Remove Tag(s)
- Set Permissions
- Run Marketing script
- Add Case
- Show Customer Clusters
- Add Calendar Event
- Random Grouping and Add Tags

Purchase Analysis - Based Marketing

- Find your VIP Customers with ease

By Duration Total Order

Order Date: 2023/11/01 - 2023/11/30

First Order day: Enter text

Order within: Enter text

Order Information

Number of Orders: >= 1

Order Amount: >=

Sales Representative: Enter text

Order's Customer List Total 10 items / 1 pages

Order's Customer List Total 10 items / 1 pages									
									Display Fields ▾
<input type="checkbox"/>	Name	Company	Amount in the Period	Orders in the Period	Total Amount	Total Orders	Average Amount	Order within	First Order day
▶ <input type="checkbox"/>	ROO		130	1	130	1	130	2023/11/25	2023/11/25
▶ <input type="checkbox"/>	AOO		140	1	276	3	92	2023/11/18	2023/09/27
▶ <input type="checkbox"/>	AOO		206	3	206	3	68.667	2023/11/15	2023/11/04
▶ <input type="checkbox"/>	AOO		285	1	405	2	202.5	2023/11/16	2023/09/27



VITAL CRM

Scenario:

Focus marketing based on customer preferences for coffee beans

Success Story:

Idou.com 愛豆網

Industry Category:

E-commerce

- Customers are treasures.
- Want to conduct segmented marketing: white-collar workers, corporate executives, premium users, and family users.
- Planning for segmented marketing with refined customer service but lacking a comprehensive tool.

The screenshot shows the Idou.com website interface. At the top, there's a navigation bar with categories like '咖啡豆', '手工掛耳濾泡咖啡', '掛耳禮盒/即溶/紅', '週邊產品', '咖啡器具', and '留言板'. A search bar is present with the text '輸入商品關鍵字'. Below the navigation, a large banner advertises a promotion: '全館咖啡豆消費滿千元 即咖啡豆買二送一'. The main content area features a large green banner for 'OKLAO Coffee Farms' with the text '掛耳式濾泡咖啡 綜合風味 (10入/袋)' and '原價199元 特價99元/袋'. To the right, there's a '搶購' (Grab Deal) section for a 'MILA COFFEE FILTER' with a price of '特價1399元' and '搶購價:1399元'. Below the main banner, there's a '最新消息 Notice' section with several bullet points and a '新鮮上架 堅持原味' section with a '50包5折' offer. The bottom right corner shows a '銷售排行榜 BESTSELLERS' section with a product from 'OKLAO'.



Founder: "We are currently working hard to rapidly import these member data into VIdegree, categorizing them in detail into VIP, corporate groups, coffee enthusiasts, schools, overseas, and other label groups. This allows us to employ different marketing strategies based on the diverse characteristics of our customer segments."



Customer

AOO 영!

Add Pictures

Tagging

Guest/Company Dinner X Liquor Scent/ Fruit Wine X

CEO Fruity Preference

Enter your note here

News Feed Company Notes Order Details Communication Records Change Log

Refresh Type All Sort by Last modified | Date of

GOO
2023/11/23 09:57
Restricted Access / AOO / Formatted

Caller notified that this batch of Colombian coffee is more acidic than before, has tropical fruit aroma, and has good flavor.

Add a comment...

Customer Back to Customer List

JOO 영!

Add Pictures

Tagging

Business Executive X Premium Product X

Executive Roasted Preference

Enter your note here

News Feed Company Notes Order Details Communication Records Change Log

Refresh Type All Sort by Last modified | Date of O

GOO
2023/11/23 09:48
Restricted Access / JOO / Formatted

colombia huila los lagos geisha washed Drip Coffee Bags
Store Price: \$100
Quantity: 10 bags

Gift: R. S. W. Top-quality PANAMA Finca Lerida Geisha Washed Contract Farming Lot Drip Coffee Bags x2 (Price: \$120)

Add a comment...

Detailed recording of customer product purchases

- Tagging to record customer preferences for product types and sending EDM (Electronic Direct Mail)
- Including a trial pack when shipping (Buy 10, Get 5 Free)



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世界各國的好咖啡，
吳若權真心推薦。」

2016 歐客佬咖啡
年度代言人
知名作家
吳若權



IDOU COFFEE::愛豆網::線
上購物網
食品 / 飲料



立即購買 讚 發訊息

首頁 關於 相片 按讚分析 更多 ▾

No longer spending a fortune on advertising, CRM boosts idol fan network performance.

Monthly revenue increased from 4,300 to 430,000 NT dollars.



VITAL CRM

Scenario:

Use the CRM tag function to summarize and classify tens of thousands of customers

Success Story:

WasangShow

Industry Category:

Cultural and Creative Industry

"Vital CRM's tags really did a great job! It's like a classification feature that allows flexible settings based on one's needs. For example, categorizing customers by various criteria such as store locations, membership levels, product types, or gender. It makes it easy to organize thousands or even millions of customer data entries according to different categories, allowing us to find the most valuable customer segments in a multi-dimensional way," praised Derla.





Thank You!