

# Monday CRM

## Easy to Build, Easy to Use

透過Monday CRM，提升客戶關係管理效率

**Daniel**

Linktech Inc @ 2024





# OUTLINE

- 01** CRM 簡介
- 02** What is Monday CRM ?
- 03** Live Demo Session
- 04** Why Monday CRM ?

01

# Customer Relationship Management (CRM) 簡介

# ●●● 什麼是 CRM ?



# CRM可以帶給我們甚麼?



## 客戶資料管理

集中管理所有客戶資料

## 分析與策略擬定

將資料轉化為具行動力的商業策略



## 客戶偏好

提供專屬且流暢的互動體驗

## 客戶忠誠度

透過有價值的互動建立長久的關係



# 4 Pillars of CRM

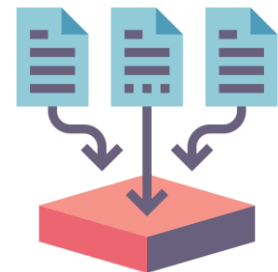
## ●●● 為甚麼需要CRM？



未能及時跟進潛在客戶



資訊混亂、難以共享



資料整理困難

●●● 最完善的CRM工具



**monday** CRM

02

# What is Monday CRM?

Monday CRM 核心功能



# Board View

The Library Society ▾ Integrate Automate Invite / 1 ...

Main Table ▾ New item ▾ Search Person Filter ▾ Sort Hide Group by ...

### Feel Good February

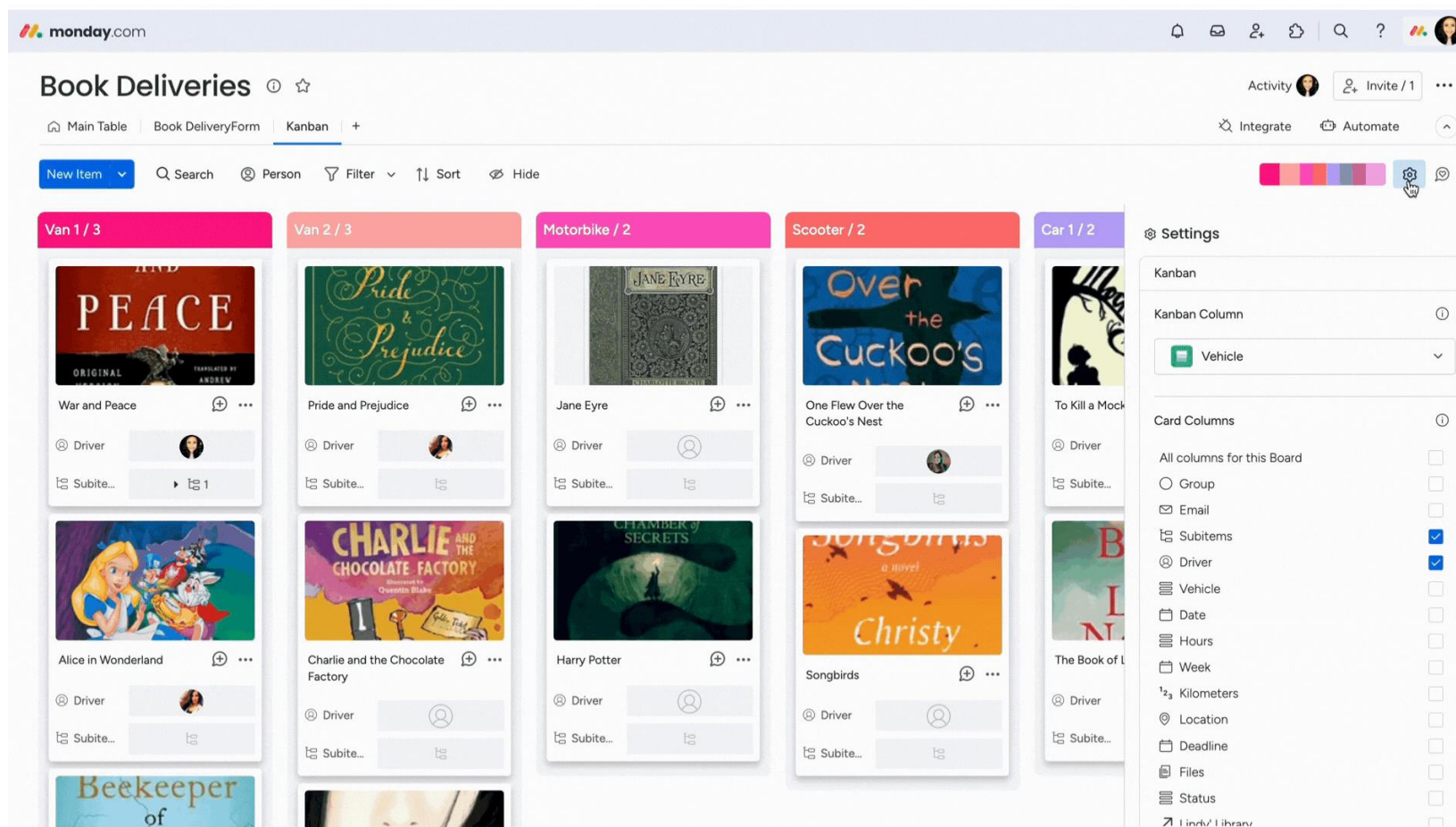
<input type="checkbox"/>	Item		Author	Discussion Leader	Book Club Stat...	Date	Timeline	Files
<input type="checkbox"/>	Bridget Jones's Diary		Helen Fielding		Done	1 Feb	1 - 7 Feb	
<input type="checkbox"/>	Homecoming		Kate Morton		Done	7 Feb	8 - 14 Feb	
<input type="checkbox"/>	Eleanor Oliphant is Completely Fine		Gail Honeyman		Done	14 Feb	15 - 21 Feb	
<input type="checkbox"/>	A Man Called Ove		Fredrik Backman		Done	21 Feb	22 - 28 Feb	
<input type="checkbox"/>	+ Add item						1 - 28 Feb	

### March Madness

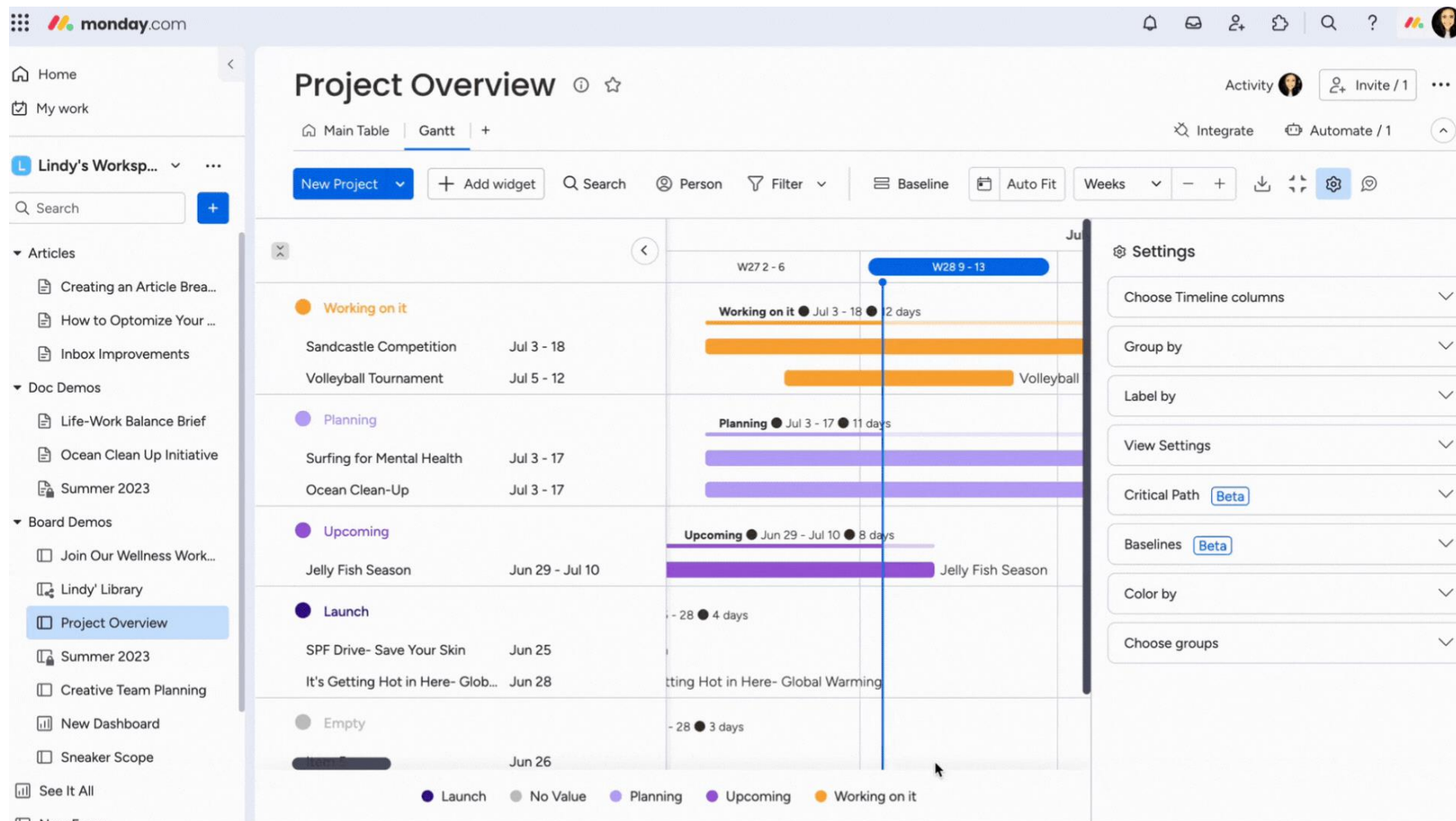
<input type="checkbox"/>	Item		Author	Discussion Leader	Book Club Stat...	Date	Timeline	Files
<input type="checkbox"/>	One Flew Over the Cuckoo's Nest		Ben Kesey		Done	1 Mar	1 - 7 Mar	
<input type="checkbox"/>	Girl, Interrupted		Susanna Kaysen		Done	8 Mar	8 - 14 Mar	
<input type="checkbox"/>	The Silent Patient		Alex Michaelides		In Progress	15 Mar	15 - 21 Mar	
<input type="checkbox"/>	The Bell Jar		Sylvia Plath		Upcoming	22 Mar	22 - 29 Mar	
<input type="checkbox"/>	+ Add item						1 - 29 Mar	

# ●●● Kanban View

打破信息壁壘，透明化流程提升溝通效能

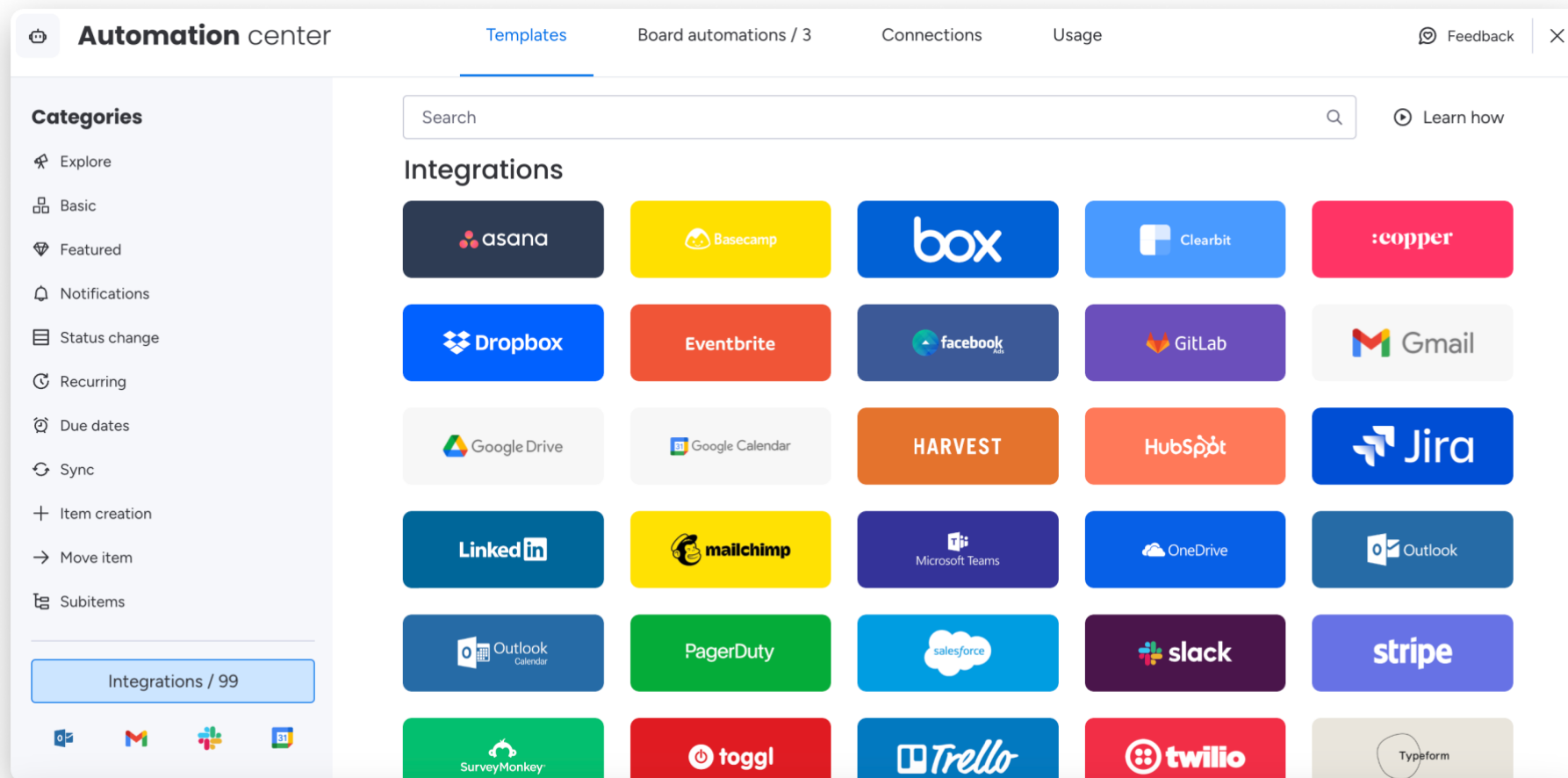


## 可視化團隊任務相依性，輕鬆掌握專案進度



# Integration

多元系統整合，構建高效工作核心樞紐



# ●●● Automations

不只是 low code，你需要的是 no code

Notifications

Status change

Recurring

Due dates

+ Item creation

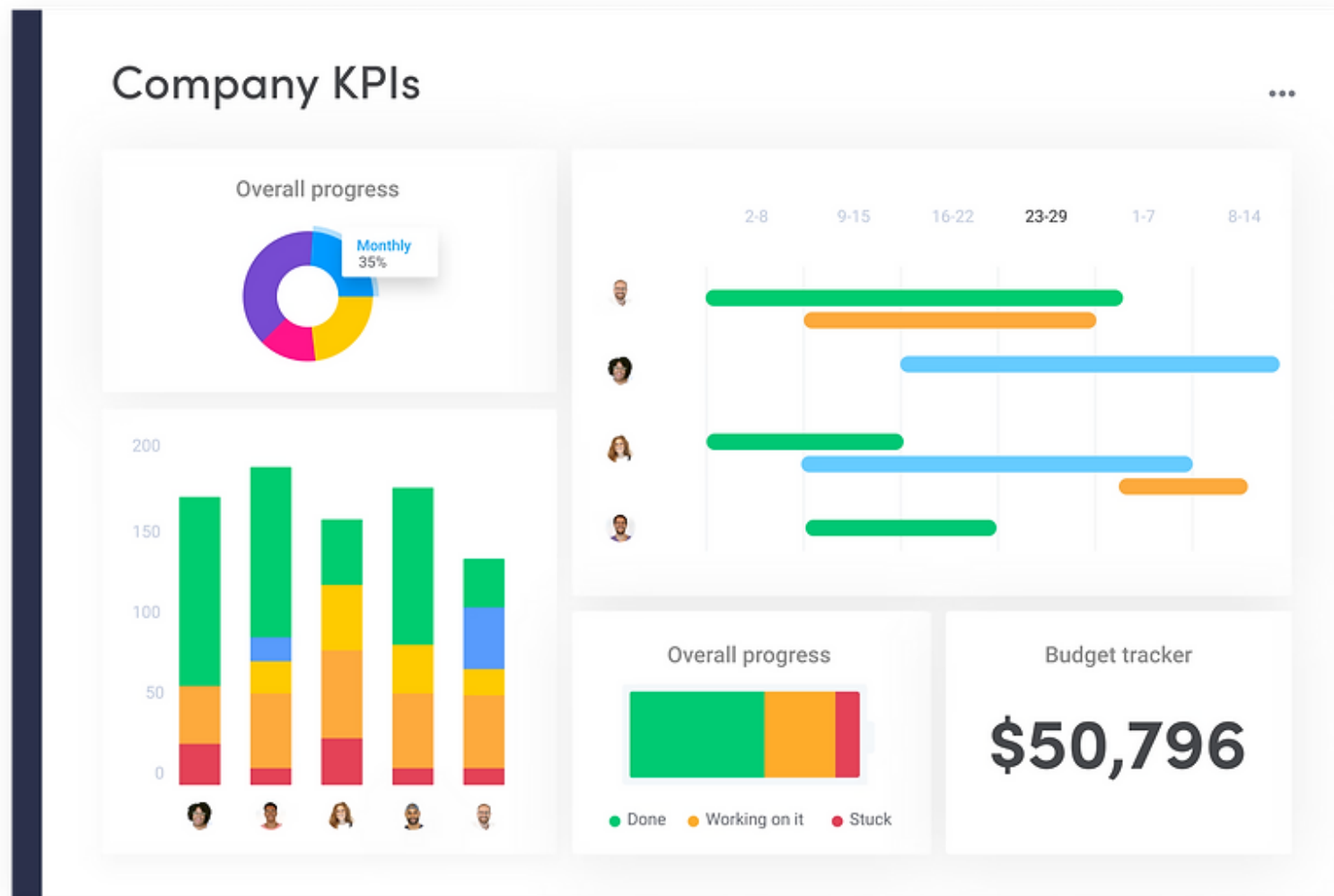
→ Move item

↳ Dependencies

When **status** changes to **for review**, create an update in **item**

+ Add to board

最佳企業決策看板，全面掌握團隊進度



## 文件管理的智能解决方案

The screenshot displays a document editor interface. At the top, there is a text format dropdown set to 'Normal text' and navigation icons. The main content area features a section titled 'Campaign performance'. Below the title, a comment from 'Guy Greenhut' asks, 'can you add all the metrics?'. The dashboard includes a bar chart titled 'Monthly campaign revenue' showing an upward trend from approximately 2 to 20 units over 10 months. Below the chart are two summary cards: 'Campaign progress' with a stacked bar chart showing 'Live' (green), 'Planned' (orange), and 'On hold' (red) categories, and a 'Budget tracker' card displaying '\$ 796'.

Month	Revenue
1	2
2	4
3	6
4	8
5	10
6	12
7	14
8	16
9	18
10	20

Category	Count
Live	4
Planned	3
On hold	3

Amount
\$ 796

# 03

## Live Demo Session

實際環境操作



## ●●● Use Case 1

針對新的潛在客戶，

我們該如何有效的將新客戶加入到Monday，並把握新客戶的銷售時機，讓我們及時跟進？

## ●●● Use Case 2

當潛在客戶轉化成聯絡人之後，如何追蹤客戶進度與紀錄客戶狀況，並將資訊分享給與團隊成員？

## ●●● Use Case 3

透過 Email 或電聯方式定期追蹤客戶評估進度，  
是否有更快更方便的方式執行這些重複性的工作，  
並且確保內部資訊一致？

# 04

## Why Monday CRM?

Monday CRM 優勢



## Monday CRM 優勢



畫面直覺, 簡單易上手

即時更新資訊, 無資訊落差



工作歷程記錄供稽核使用

較彈性的權限控管



完善的跨部門協作功能

無需系統維護



Q&A



●●● 立即免費試用 [monday.com](https://monday.com)



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# THANK YOU



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