

如何利用数字化转型实现医疗机构 360度客户关怀服务





基于互联网时代的医院CRM方案简介



和睦家及Bupa医疗机构成功案例介绍



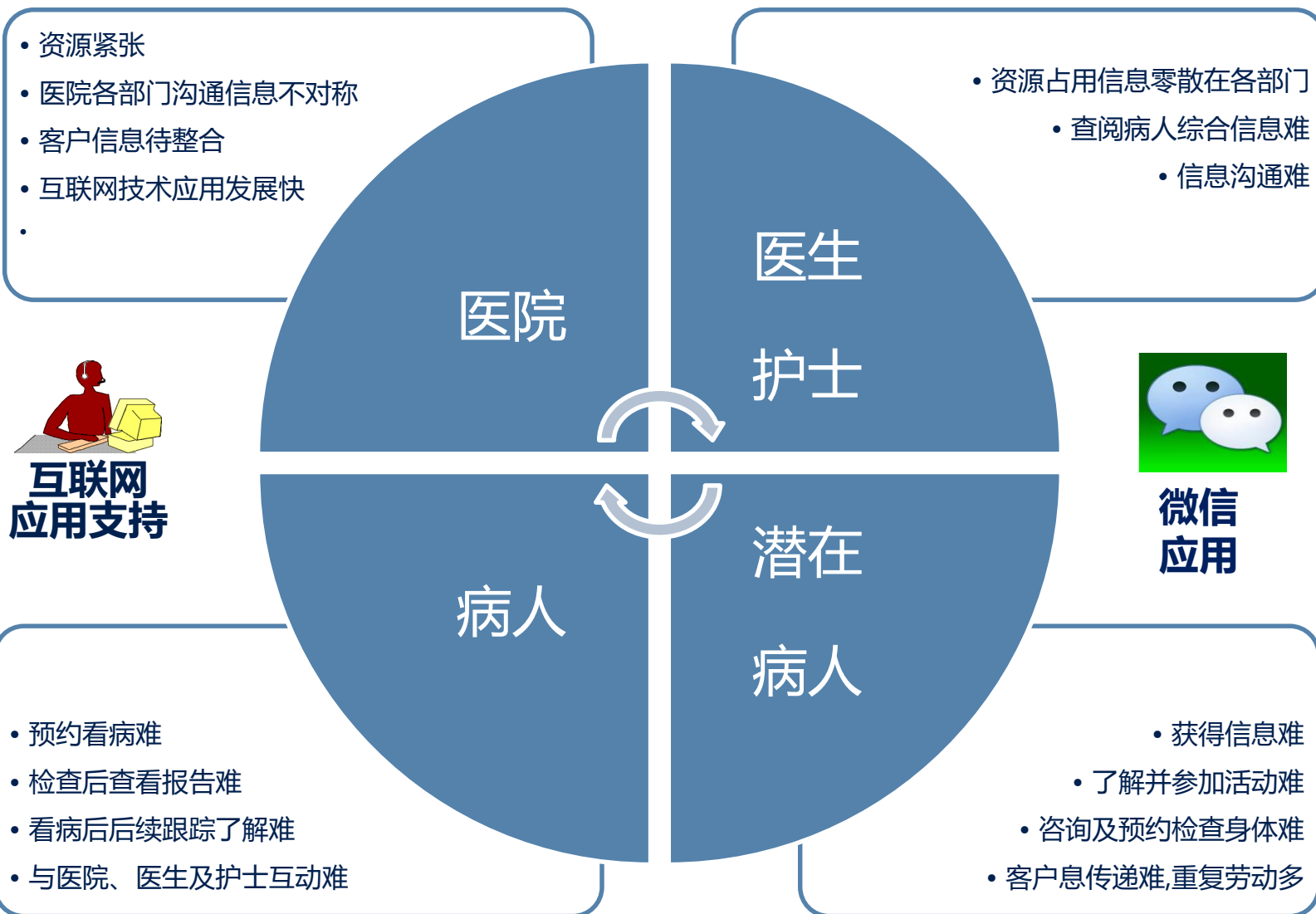
Tectura 公司简介



Q&A

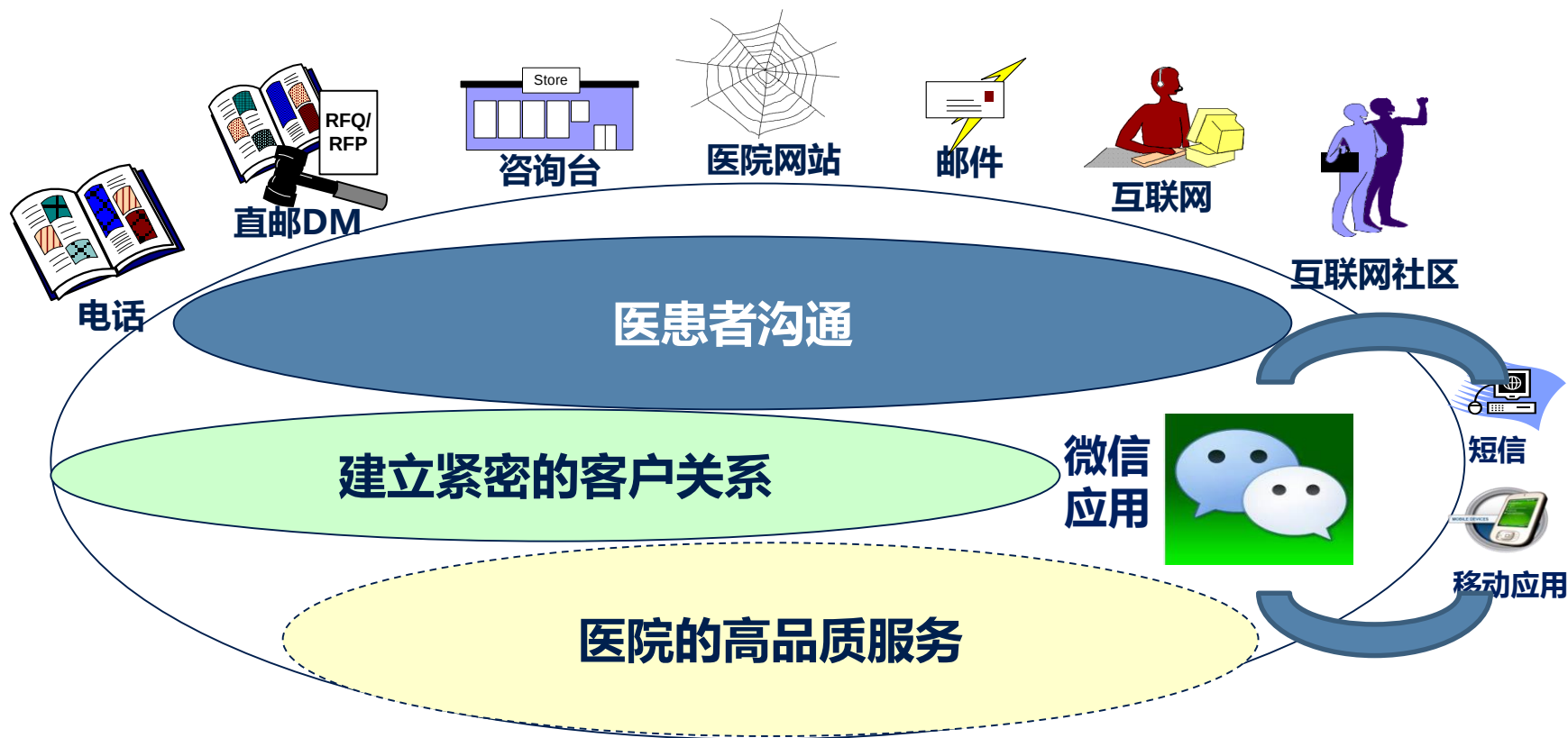
医院等医疗机构客户关系管理现状

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互联网时代的医院与医患360度沟通渠道

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基于互联网时代的医患者沟通渠道为提高客户满意度奠定了基础

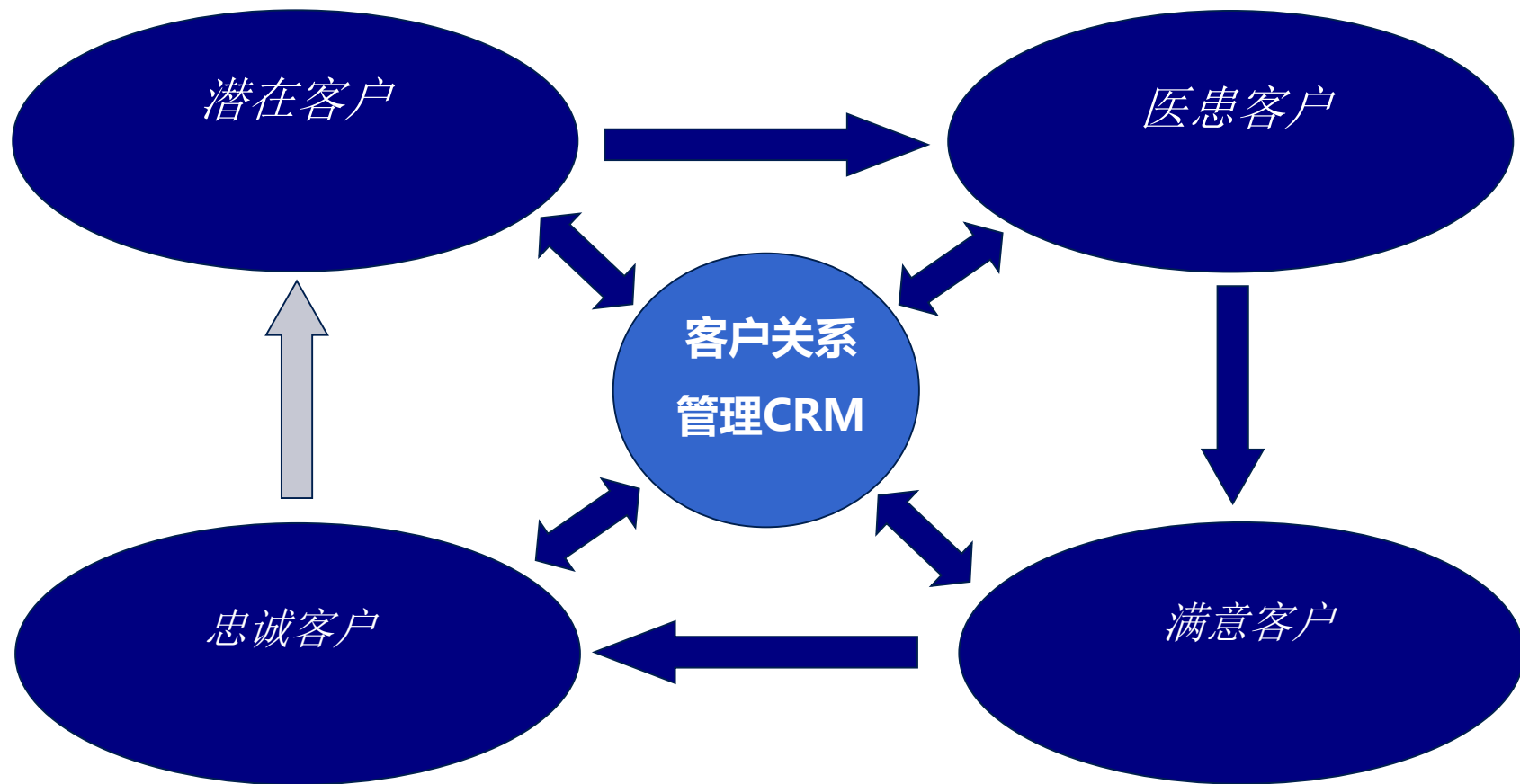
互联网时代的医院等医疗机构CRM方案规划TECTURA®

基于互联网时代的医院CRM方案示意图



基于互联网时代的医院CRM目标

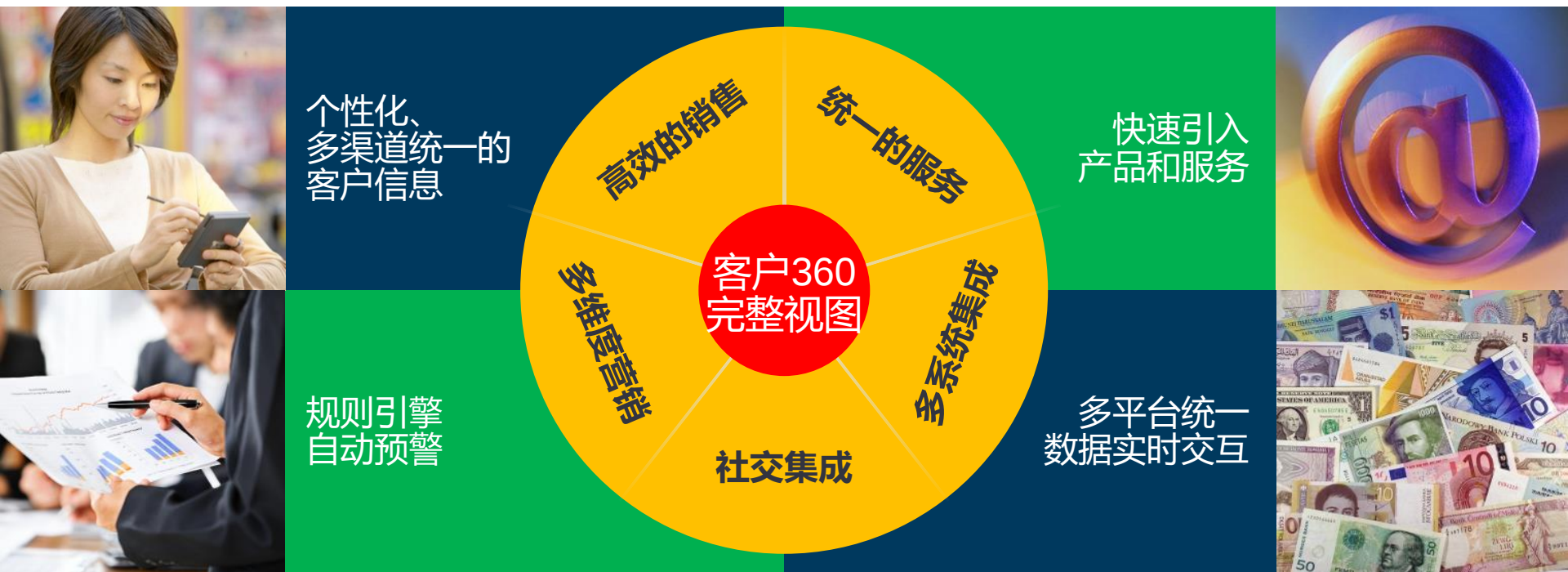
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Microsoft Dynamics CRM平台概况

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微软CRM可支撑以客户为中心的业务模式扩展，是支持“移动”、“社交”、“可配置”的智能化、平台化的CRM，可适应医疗机构不断的营销扩展的业务需求...



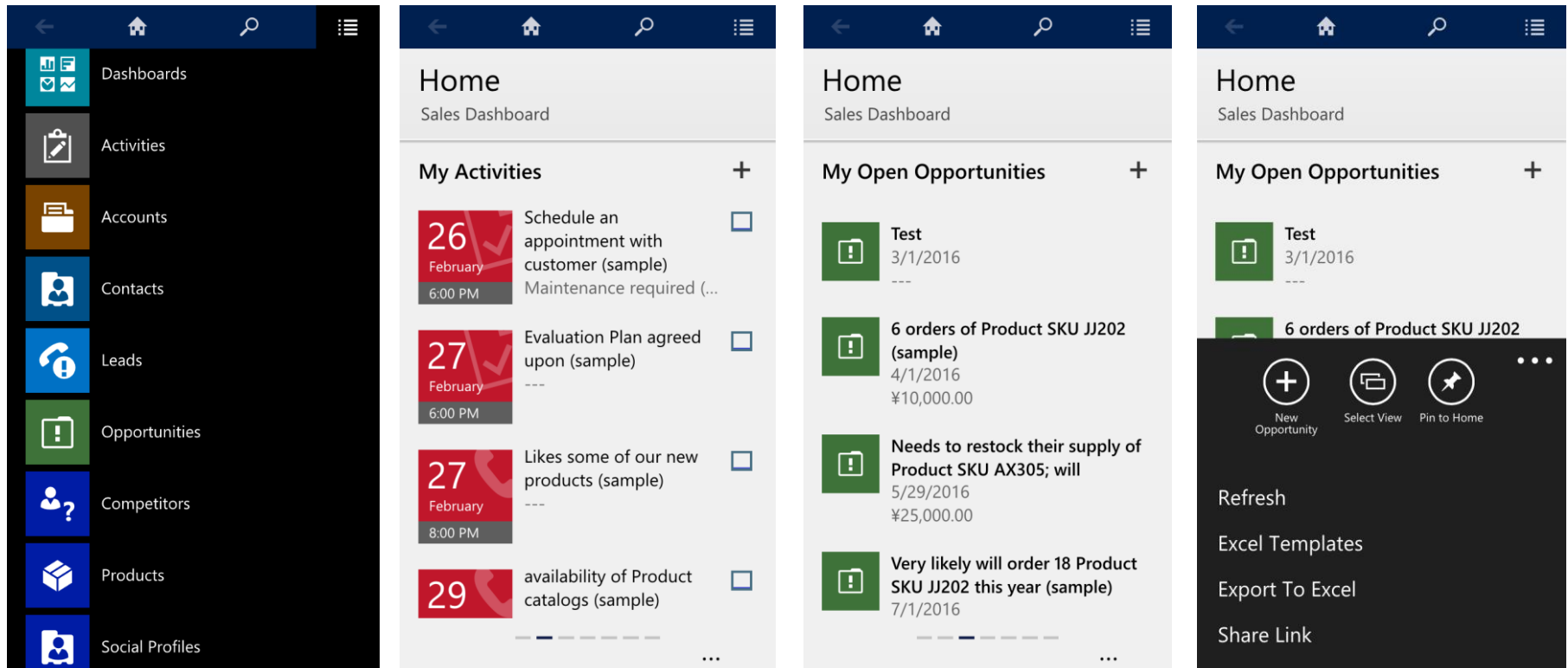
微软Dynamics CRM 概览

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微软Dynamics CRM移动应用1

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微软Dynamics CRM移动应用2

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Account

Fourth Coffee (sample)

someone1@example.com
555-0150

Litware, Inc. (sample)

someone2@example.com
555-0151

Adventure Works (sample)

someone3@example.com
555-0152

Fabrikam, Inc. (sample)

someone4@example.com
555-0153



Cancel



New



Clear field

← Home Search Menu

Test

Opportunity

Qualify → Develop → Propose

Summary

Test

Contact
Jim Glynn (sample)

Account
Fourth Coffee (sample)

Purchase Timeframe

Currency *
人民币

...

← Home Search Menu

Test

Opportunity

Qualify → Develop → Propose

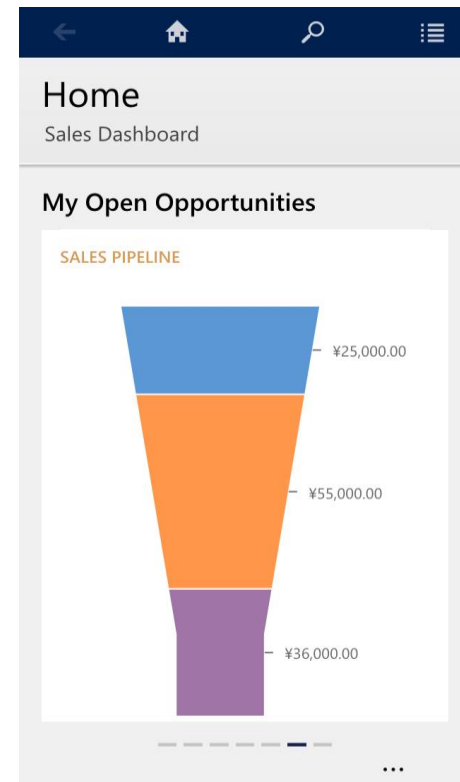
Error: This operation failed b... [Read more](#)

Propose Stage

- Identify Sales Team mark complete
- Develop Proposal mark complete
- Complete Internal Review mark complete
- Present Proposal mark complete

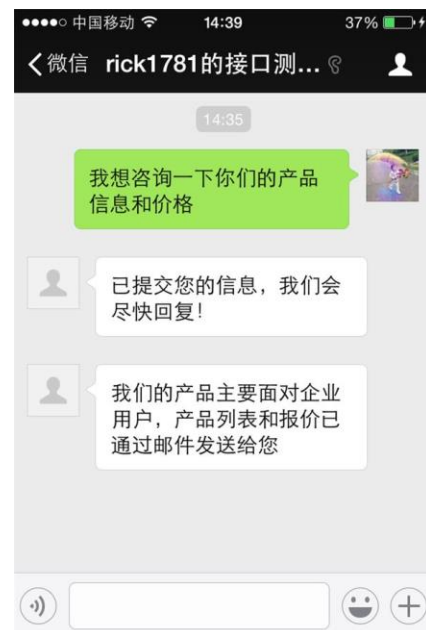
Offline

...



微软Dynamics CRM与微信集成

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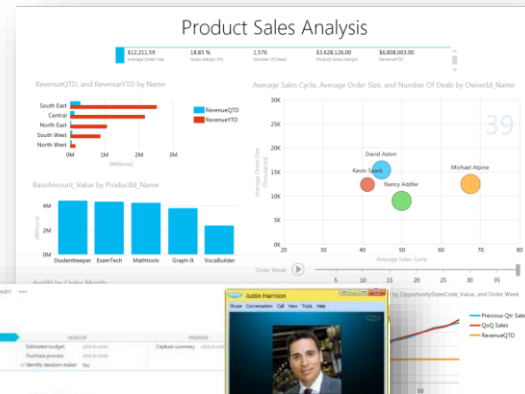


微软CRM与微信对接,可以实现现在CRM系统内直接接收微信信息,并结合TATA业务流程自动发送相关信息给微信用户、客户、员工等。结合微信提供的接口功能,可实现不同业务用途。

微软Dynamics CRM专为Office而设计， 紧密整合

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 Power BI	分析信息	强大的可视化	管理预警	移动应用
 Excel	输入/输出&纵 列选取	静态工作表	动态工作表& PivotTable	PowerView & PowerPivot
 SharePoint	文件存储	按照实体进行 配置	可扩展性——根据SharePoint上的 记录进行行动	
 Lync & Skype	联系人展示	沟通&追踪		
 Word	生成文件			



Justin Harrison

Office 161 Railroad
Sales Manager
400-456-7890
j.harrison@business.com

Summary

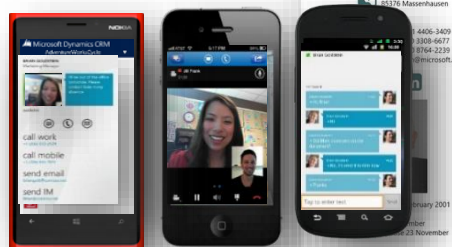
Estimated budget: 100,000 USD
Estimated revenue: 200,000 USD
Estimated profit: 100,000 USD

Products and Services

Product/Service	Price
Motor: BMW 525d	€ 98,00
Motor: VW Passat 1.8	€ 56,00
House: Berlin	€ 294,50
Life Primary	€ 84,75
Education: Many School	€ 93,00
Unit Trust	€ 145,06
Credit Life	€ 115,65
Personal Accident	€ 12,35

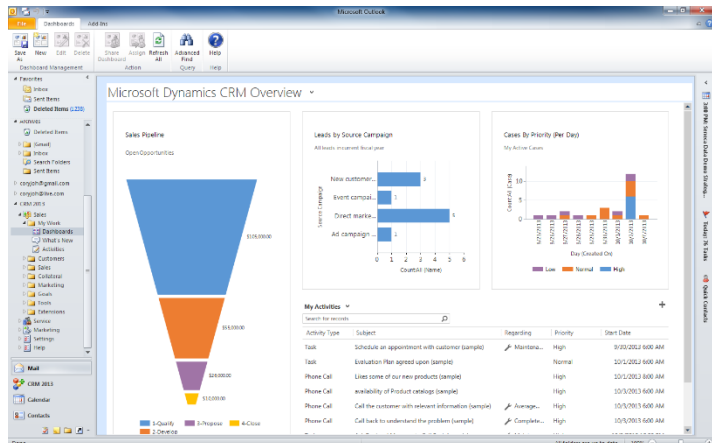
Life Events

- 02.08.12 10:00:00: Confirmed follow-up meeting at home. Updated home address.
- 02.08.12 14:00: Client requested to add motor insurance for new vehicle and cancel existing insurance (BMW, Auto & General).
- 17.07.12 11:30: Marketing campaign - Invitation to Golf Day
- 13.02.12 11:30: Scheduled follow-up meeting for Annual review
- 23.12.11 09:00: Annual review Meeting



CRM在Outlook中与Exchange协作

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在微软原生的Outlook用户界面中，更便捷地使用CRM并无缝追踪所有客户的联系情况。解锁能力应用Outlook功能，例如目录、条件格式化、标记！

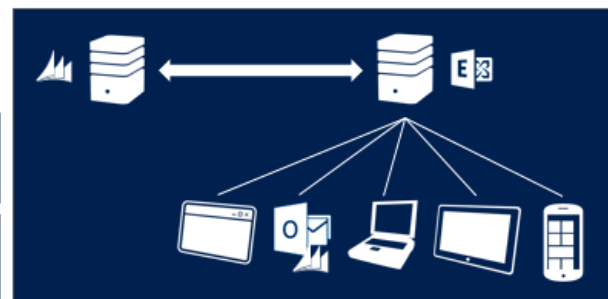


服务器端的同步，在规定的条件下可触发CRM，允许任何设备随时随地的销售！

Always On

Built-in

Direct Connection



Synchronize**

Send Email

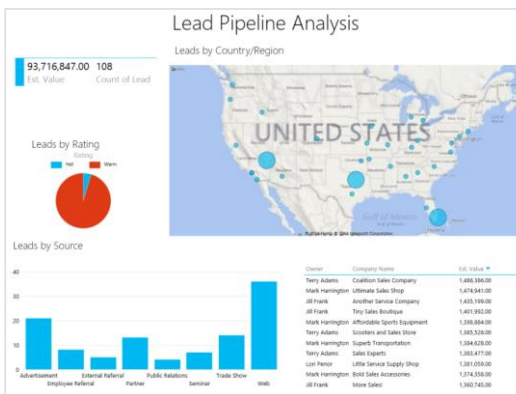
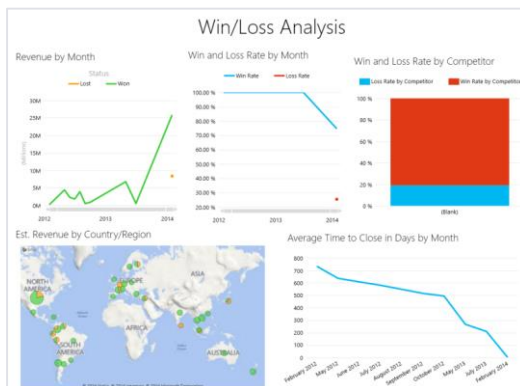
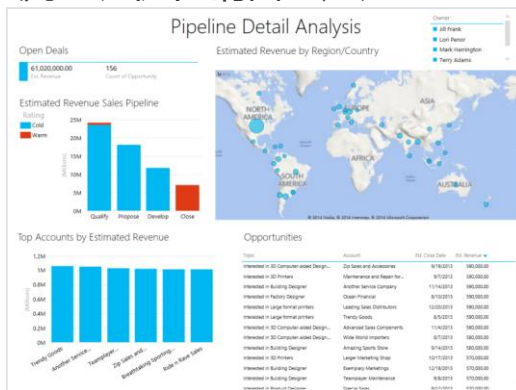
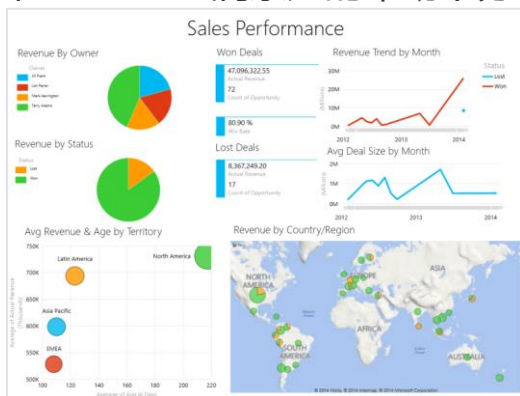
Send Appt

Track by Rules

强大的互动视觉化

TECTURA®

在Power BI洞察力的帮助下分析、测量、优化销售生产力



与数据互动，寻找深层洞察力

集中探索正确的线索和商机

通过混合CRM和内部/外部数据来探测趋势，以求完整可信的洞察力

熟悉的Excel环境用于分析

与O365实现共享、协作

在不同设备间进行访问



基于互联网时代的医院CRM方案简介



和睦家及Bupa医疗机构成功案例介绍



Tectura 公司简介



Q&A

和睦家医院CRM案例

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和睦家医疗集团（United Family Healthcare，UFH），是美国纳斯达克上市公司美中互利旗下在华具备高水平的开拓性医疗机构。和睦家在中国成立的16年以来，已经在北京，上海，无锡，天津和广州设立了医院及诊所，在当地都能够提供一流的、高质量的国际标准医疗服务。北京，上海和天津和睦家医院已经通过了国际联合医疗委员会的认证，并且是中国唯一获得该认证的医疗集团。



和睦家CRM项目的背景

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项目主要目标：提升客户满意度，提高客户口碑

CRM系统实现价值

- 通过CRM实现了对病人信息进行360度综合管理
- 方便的实现了对讲座等活动信息的管理,直接通过系统与短信平台对客户进行信息发布、活动报名等信息反馈
- 建立了统一的CRM服务平台，实现资源共享

4

零散的客户信息管理

- 和睦家定位为“高端人群健康服务的提供者”，但病人客户信息收集零散；
- 客户接触渠道单一，没有统一服务平台；
- 由于信息缺失，不能很好提供客户关怀服务等，进而提升客户满意度

1

业务挑战

缺乏咨询、预约、投诉等统一服务管理

3

- 各地医院设立了自己的Callcenter服务电话，无法在一个平台上协同进行客户信息查询和信息共享
- 各地Callcenter采集的病人动态信息，不能实时更新到统一的信息平台上以供使用，造成许多重复劳动和客户的质疑
- 对于客户电话预约挂号、投诉等综合服务信息，不能和医院内部进行实时的信息互动

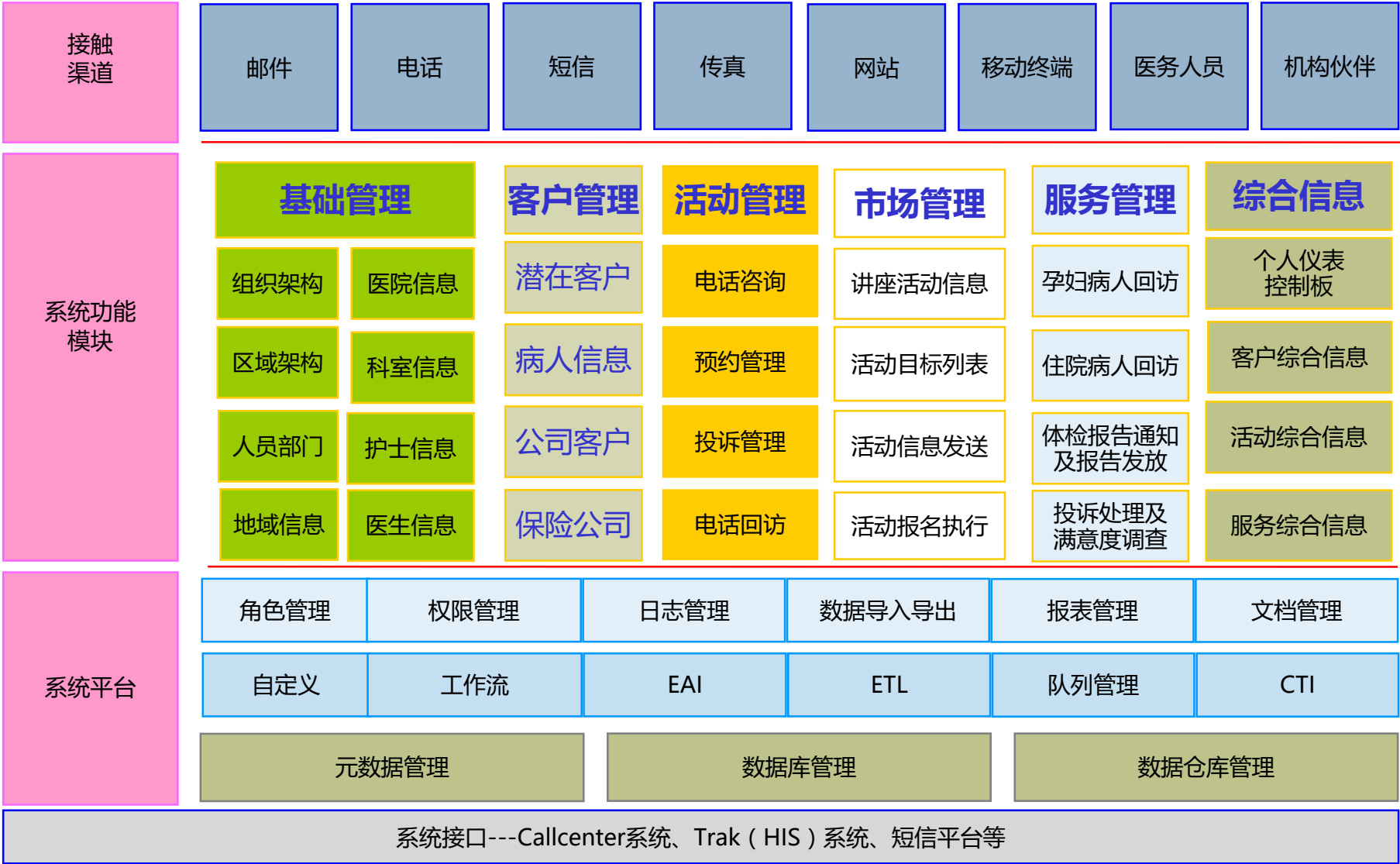
2

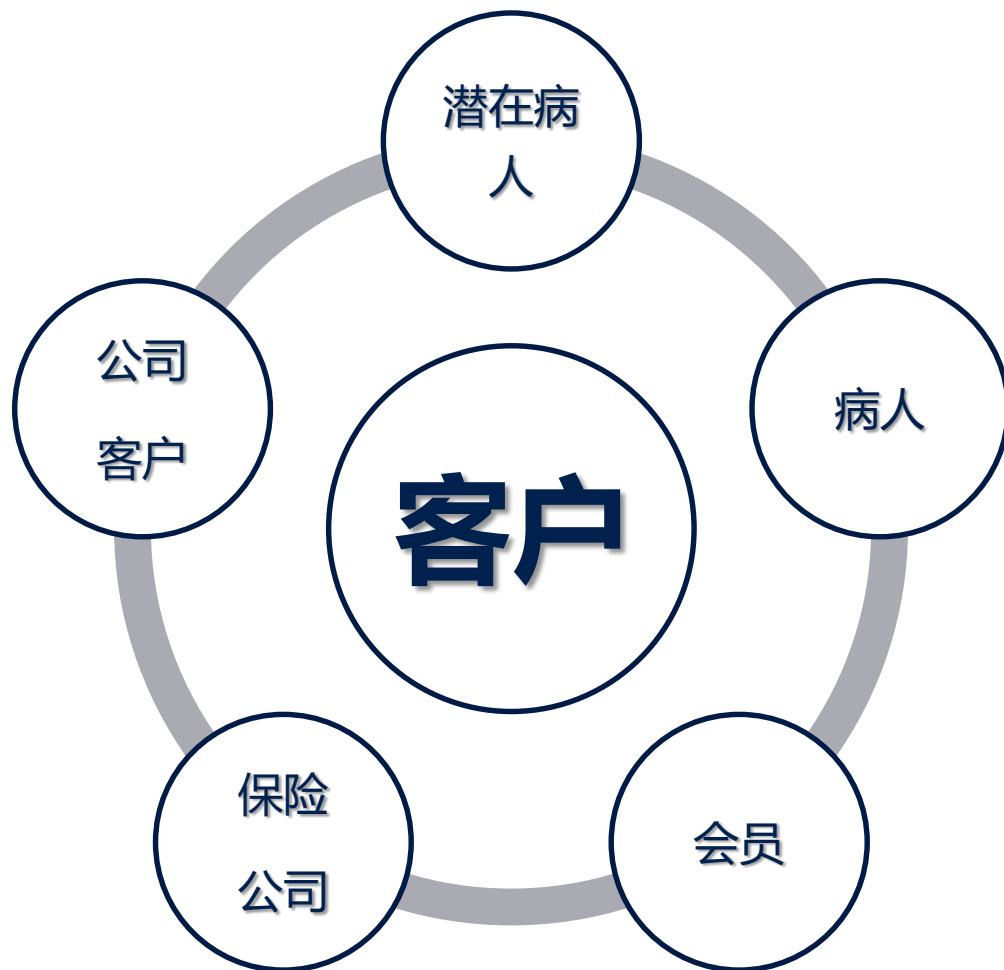
讲座等活动推动不清晰

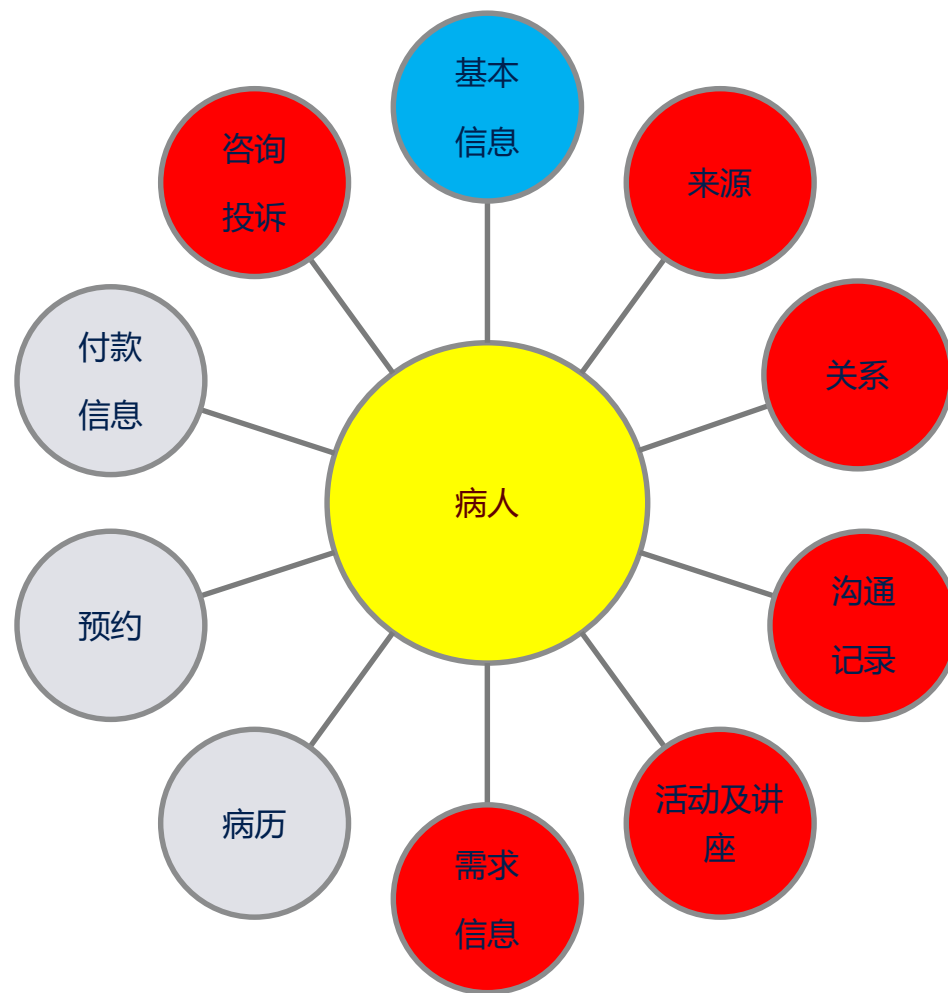
- 和睦家设置诸如‘女性健康’、‘家庭生育’等相关讲座，一方面希望提高潜在客户及病人对和睦家的认同，另一方面希望更好的提供优质的健康服务，但讲座等活动的召集及效果评估的管理缺失
- 讲座活动的科室医生资源及活动场地经常出现资源缺失而进行活动改期，影响客户好评

和睦家基于微软CRM系统的解决方案

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和睦家CRM整体介绍

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File

Dashboards

Save As

New

Edit

Delete

Set As Default

Share Dashboard

Assign

Refresh All

Advanced Find

Dashboard Management

Action

Query

Workplace

My Work

Dashboards

Activities

Calendar

Imports

Duplicate Detection

Reports

Announcements

Workplace

Customer Management

Marketing

Service

Settings

Dashboard: Microsoft Dynamics CRM Overview

Sales Pipeline

Open Opportunities

\$1,75,000.00

\$85,000.00

Leads by Source Campaign

All leads in current fiscal year

Source Campaign	Count
New customer...	3
Event campai...	1
Direct marke...	5
Ad campaign ...	1

Cases By Priority (Per Day)

My Active Cases

Day (Created On)	Low	Normal	High
6/26/2013	1	1	0
6/27/2013	1	1	0
6/28/2013	1	1	0
6/29/2013	1	1	1
6/30/2013	1	1	1
7/1/2013	1	1	1
7/2/2013	1	1	1

Activities: My Activities

Activity Type	Subject
☐ Campaign Activity	invite to attend the meeting
☐ Phone Call	invite to attend the meeting
☐ Phone Call	invite to attend the meeting
☐ Phone Call	invite to attend the meeting

Microsoft Dynamics CRM

Tectura_VPN Last name UFH

File

Contact

Add

Customize

Save

Save & Close

Save & New

Deactivate

Delete

Add to Marketing List

Connect

Assign

Share

E-mail a Link

Run Workflow

Start Dialog

Information

Patient Information

Related

event(Complaint)

Phone Calls

CC_Telephones

Consultant Order

event(Complaint)

Contact

MRN: 881525 , FullName: Nicolas DE LACERDA

Patient Information

CRM No

Loyalty Customer

Microsoft CRM Bob's copyright

患者信息管理

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CheckOut Idle NeatenEnd RestEnd Hangup HoldEnd ConsultEnd ConfEnd TransferEnd DailAgain Config 分机 Admin ? UFH

File Contacts View Charts Add Customize

New Edit Activate Deactivate Merge Detect Duplicates MassSendSMS Association Send Direct E-mail Add to Marketing List Connect Assign Process Run Report Import Data Advanced Find

Records Actions Collaborate Data

Customer Ma... Patient

Company
Company
Insurance Company

Individual
Patient
Member
Potential Patient

Workplace
Customer Management
Customer Care Center
Marketing
Service
Settings

Full Name	sex	E-mail	MobilePhone	Business Phone...	Parent Custome..
Yan XinLIU	M	000@ufh.com	13916106236		
NicolasDE LACERDA BREGANTIM	M	fernanda.brega...	15000743310		
HuaYingWEI	M	000@ufh.com	13811864651		
ZilongZHAO	M				
CarolynAMOS	M				
Hao YiZHANG	M				
BaeSEO JEONG	M				
XinchenJIANG	M				
LuMI	M				
Teck ChuanKEE	M				
AvnitsINGH	M				
Qi NuoMa	M				
MartinaJANASOVA	M				
HongZHAO	M				
JunZHOU	M				
JieunOH	M				
Teong JinGoh	M				

1 - 75 of 5000+ (0 selected)

All # A B C D E F G H

http://192.168.0.173/?etc=2&extraqs=%3f_gridType%3d2%26etc%3d2%26id%3d%257b8E414963-318C-413C-B - Windows Internet Explorer

Microsoft Dynamics CRM UFH Admin ? UFH

File Contact Add Customize

Save Save & Close Deactivate Add to Marketing List Connect Assign Copy a Link Run WorkFlow Start Dialog Run Report Patient Edit

Information
Patient Information

Related
event(Complaint)
Phone Calls
CC_Telephones
Consultant Order
event(Complaint)
Phone Call(delete)

Basic Infor
Relationships
Patient episode
Patient Invoice
Patient Appointment

Marketing
Marketing Lists
Campaigns

Service
Appointment Order
Consultant Order
Inpatient Visit
Body Check Up
OB Visit

MRN: 881525 , FullName: Nicolas DE LACERDA BREGANTIM

CRM No PAT201403120133 Type Patient

Loyalty Customer No No Yes Is Member No No Yes

VIP No No Yes VSP No No Yes

First Name * Nicolas Last Name DE LACERDA BREGANTIM

chinese name Full Name NicolasDE LACERDA BREGANTIM

MRN 881525 Registration Date

Date of Birthday gender Male

City 上海 E-mail fernanda.bregantim@gmail.com

MobilePhone 15000743310 Address Jingxiu Dong Rd 418, House 143

ID Number YAG67769 Address2

Nationality BRAZIL Local Post Code 200135

ID Type Passport Number Membership Type

Status Active

患者关联信息的整合

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Microsoft Dynamics CRM

UFH Admin UFH

File Contact Add Customize Campaigns

Activate Deactivate Delete Campaign Bulk Delete Connect Share Copy a Link E-mail a Link Assign Campaigns Filter Save Filters Save Filters as New View Set As Default View Chart Pane Run Workflow Start Dialog Run Report Export Campaigns

Records Collaborate Current View View Process Data

Information Patient Information

Related Phone Call(delete)

Basic Infor Relationships Patient episode Patient Invoice Patient Appointment

Marketing Marketing Lists Campaigns

Service Appointment Order Consultant Order Inpatient Visit Body Check Up OB Visit Event service requirement...

Processes Workflows Dialog Sessions

Contact MRN: 864514 , FullName: Zi Zhen QIN

Campaigns Campaign Associated View

Campaign Cod...	Subject name	Status Reason	Created On
CMP-01001-B9T...	马上有孕产套餐推广活动 (Simple1)	Proposed	12/12/2013 10:4...

Information Patient Information

Related event(Complaint) Phone Calls CC_Telephones Consultant Order event(Complaint) Phone Call(delete)

Basic Infor Relationships Patient episode Patient Invoice Patient Appointment

Marketing Marketing Lists Campaigns

Service Appointment Order Consultant Order Inpatient Visit Body Check Up OB Visit Event

Processes Workflows Dialog Sessions

Contact MRN: 881525 , FullName: Nicolas DE LACERDA BREGANTIM

DATEFROM DATETO 查询

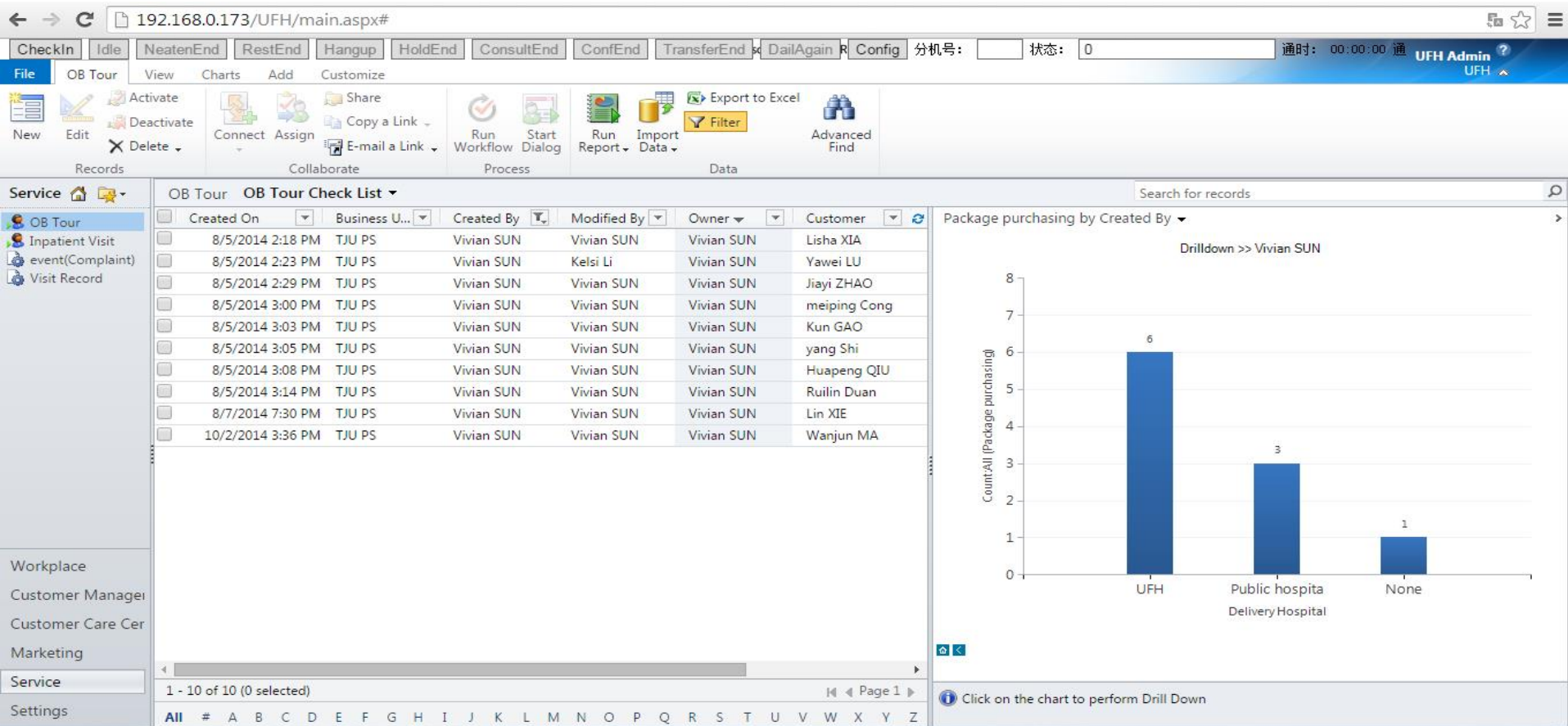
Episode number	Date	Time	Care Provider Code	Hospital	Insurance	Type	Status	Ward	Location Code	Discharge Date	Discharge Time	Adm Category	Adm Reason
HS00000830-14	3/12/2014	2:20:00	li.xin	Huashan International	Allianz - Verification	Outpatient	Pre-Admission		HSC Pediatrics	1/1/0001	12:00:00		
SHO0062004-13	11/13/2013	11:40:00	WANG Jun	Shanghai United Family Hospital	Allianz - Verification	Outpatient	Discharged		SHU Surgical	11/13/2013	11:40:00		

第1页 共1页 首页 上一页 下一页 尾页 GO

Status Active

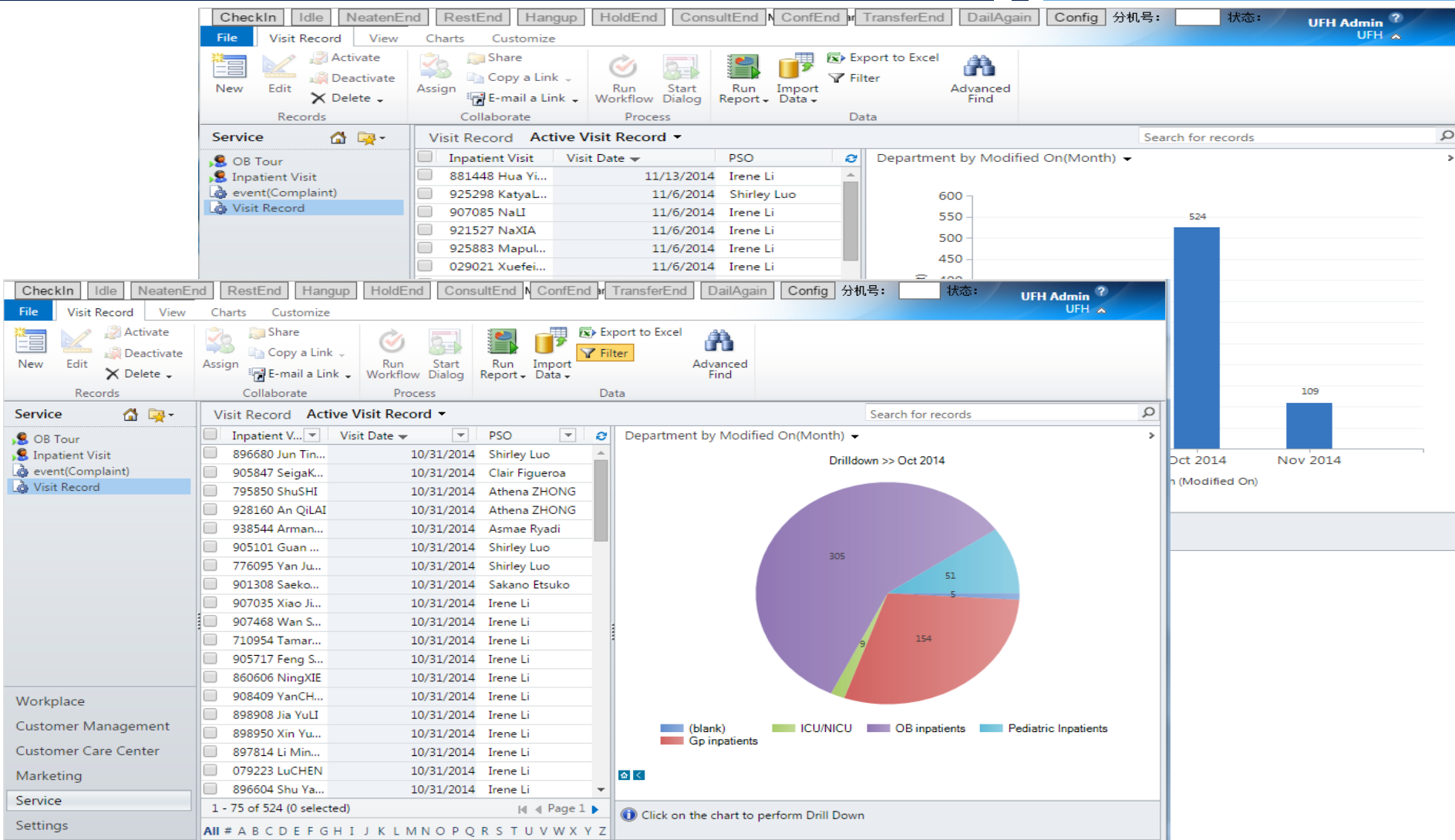
医院及科室参观管理

TECTURA®



住院患者服务管理

TECTURA®



CallCenter及客户关怀

TECTURA®

Microsoft Dynamics CRM

UHF Admin ?
UHF

File General Tools Pop Screen History Information Customize

Customer Operation

Follow Up Consult Conference SoftPhone Hold

CCForm

Customer Information Description Notes

Related

Common

Consultant Order event(Complaint)

Processes

Workflows

Pop Screen

15028558261

Phone 150285582... IncomingArea 河北 承德 VSP No

IVR 代表欢迎语, 一级菜单:中文->代表欢迎语, 二级菜单:咨询->

Basic Information

Title

First Name Ai

Estimate Date of Birth

Patient Type

Country of Birth

Region

Contact Information

Email 99095

Country

Activity Status

Information

General Appointment Order Notes

Related

Common

Activities Closed Activities Connections Audit History CC_Flowup

Processes

Workflows Dialog Sessions

Microsoft Dynamics CRM

UHF Admin ?
UHF

File Consultant Order Add Customize

Save Save & Close Save & New Deactivate Delete

Search Customer Search Customer Collaborate

Connect Assign Copy a Link E-mail a Link

Run Workflow Start Dialog Run Report

Consultant Order

14090316360049

Consultant Order

Order Number * 14090316360049 Source Order Order Type Appointment Order

CCSNumber 1636 Phone Number 15110219543 Type Of Calls * Inbound

Request Items1 * Clinic and disease c Request Items2 * OB clinic Request Items3 * 妇科检查预约

Emergency Status CCSName * LI Xiaochen

Contact * YangYANG patient * YangYANG

Contact Relationship Order Time

City * Beijing CCSEXT.

Hospital * BJU Feedback Time

Department * OB/GYN Created On 9/3/2014 3:45 PM

Modified By LI Xiaochen Modified On 9/3/2014 3:46 PM

FCR No Yes reason of FCR

Status Active

Microsoft Dynamics CRM

Qi Colin UFH

File event/complaint(New) Add Customize

Save Save & Close Deactivate Delete Assign Copy a Link E-mail a Link Run Workflow Start Dialog Run Report

Information

- General
- Notes

Related

Common

- Activities
- Closed Activities
- Audit History

Processes

- Workflows
- Dialog Sessions

event/complaint(New)

BJUC 2013-006

Medical Record No: 245426 Date Event Occurred: 2013-01-03 0:00

Responsible Area (primary): Family Med Responsible Area (secondary): Internal Medicine

PR Ref. No.:

Event Type A: 007 Communication Detail Event Type A: B physician

Event Type B:

Patient Type:

Brief Description of Event: pt upset with

Staff Name (if Relevant):

Follow Up Action:

Created By: Qi Colin

Notes

Attach File

Status: Active

Service

- Cases
- OB Visit
- Inpatient Visit
- Body Check Up Task
- Service Calendar
- event(Complaint)

Workplace

Customer Management

Customer Care Center

Marketing

Service

Settings

event(Complaint) Unsolved Complain Orders

Event No	Patient	Contact	Complain CC	Attending Physi...	Brief Descriptio...	Complaint Mad...	Complaint Ref...
☐ E201403190001	Hao HongCHEN	Hao HongCHEN				No	
☐ E201402240002	Paula Gutterres...	Paula Gutterres...				No	
☐ E201402240001	SvenEDDICKS	SvenEDDICKS				No	
☐ E201401250001						No	
☐ E201401240001						No	
☐ E201312280001	Hu	Hu				No	

1 - 6 of 6 (0 selected)

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

市场营销活动执行及跟进

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Microsoft Dynamics CRM

File Campaign Add Customize

Save Save & Close Deactivate Save Copy as Campaign Copy as Template Connect Assign Sharing Copy a Link E-mail a Link Run Workflow Start Dialog Run Report

Information

- General
- Financials
- Administration
- Notes

Related

- Common
 - Planning Activities
 - Campaign Activities
 - Campaign Responses
 - Connections
 - Audit History
- Sales
 - Target Products
 - Sales Literature
- Marketing
 - Target Marketing Lists
 - Related Campaigns
- Processes
 - Workflows
 - Dialog Sessions

Campaign 慈善活動 (範例)

General

Name * 慈善活動 (範例) Status Reason Proposed

Campaign Code CMP-01006-L619Q6 Campaign Type Event

Currency * 人民幣

Expected Response (%)

Offer

Price List

Schedule

Proposed Begin Date

Proposed End Date 2012/7/24

Description

Description

Status Active

Create Quick Campaign Wizard -- Webpage Dialog

Select the Activity Type and Owners

Select what type of activity to create.

Activity Type:

- Phone Call
- Appointment
- Letter
- Fax
- E-mail

Select who will own these new activities.

Assign these activities to:

- ☒ Me
- ☐ The owners of the records that are included in the quick campaign
- ☐ Assign to another user or queue

Select whether e-mail activities should be closed.

☒ Send e-mail messages automatically and close corresponding e-mail activities.

<Back Next> Cancel

http://crmweb01/MicrosoftCRMBusinessUnit/MA/MiniCampaign/MiniC Local intranet | Protected Mode: On

和睦家通过CRM的咨询和实施项目之后，极大的提升了客户满意度，在组织、流程、知识等方面获得了显著的改善和可观的经济效益。



统一、集中管理的客户信息管理及市场营销服务管理体系

Bupa CRM案例

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Bupa(保柏)总部位于美国，为全球2000多万人提供医疗保健分析服务、个人健康辅导服务以及医疗决策工具。2006年在北京设立代表处，专注市场调研，以及探索如何在提高中国民众的保险及医疗保健水平方面做出的贡献。2007年起，Bupa中国代表处启动一项名为“管理质量服务的医院评估项目”。2011年Bupa在中国成立服务公司，更好的服务国内客户并为国际健康险业务提供全面支持。



快速链接

- [预约](#)
- [医务人员](#)
- [地图 & 地点](#)
- [在线招聘](#)
- [联系我们](#)



About our business in China

Bupa has had a representative office in Beijing since 2006, serving primarily to understand the market, build relationships and explore opportunities for our domestic presence in China. In 2011, we also set up Bupa Consulting (Beijing), providing services including administrative and customer support for global health plans underwritten by Alltrust Insurance.

As an extension to the 10-year exclusive distribution partnership between Bupa and Hang Seng Bank in Hong Kong, Bupa and Alltrust Insurance partner with Hang Seng Bank in China to provide Hang Seng's personal and corporate customers with access to a unique suite of medical insurance products.



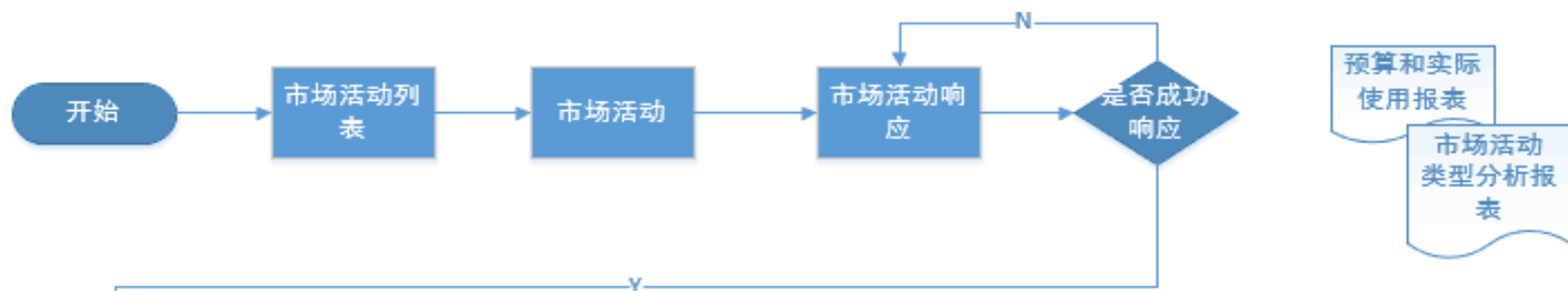
Buap总业务流程

TECTURA®

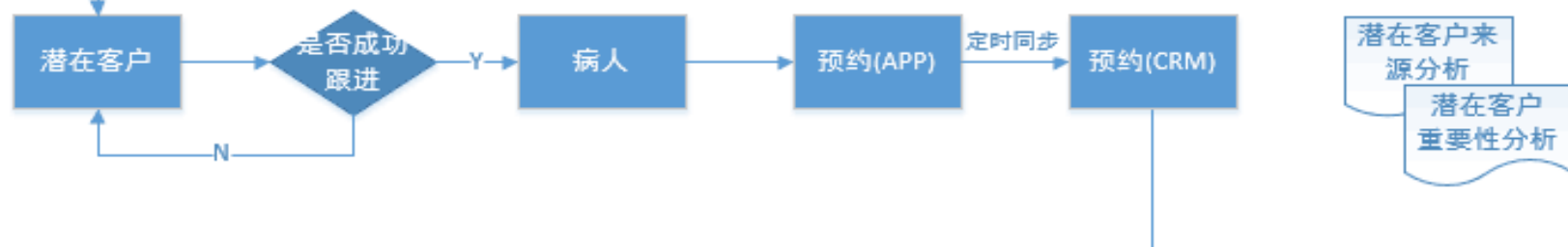
Bupa 总业务流程

Phase

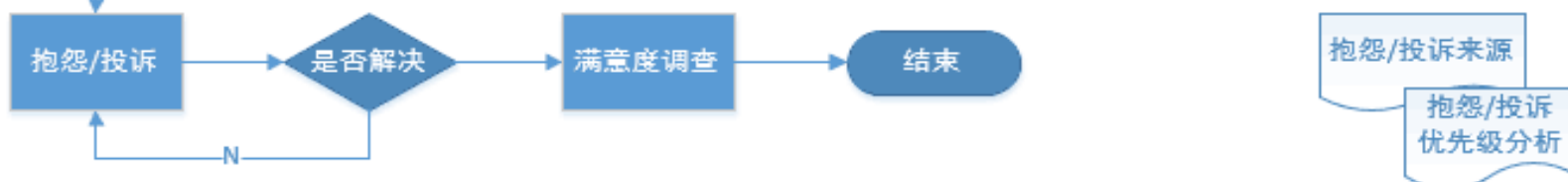
市场管理



销售管理

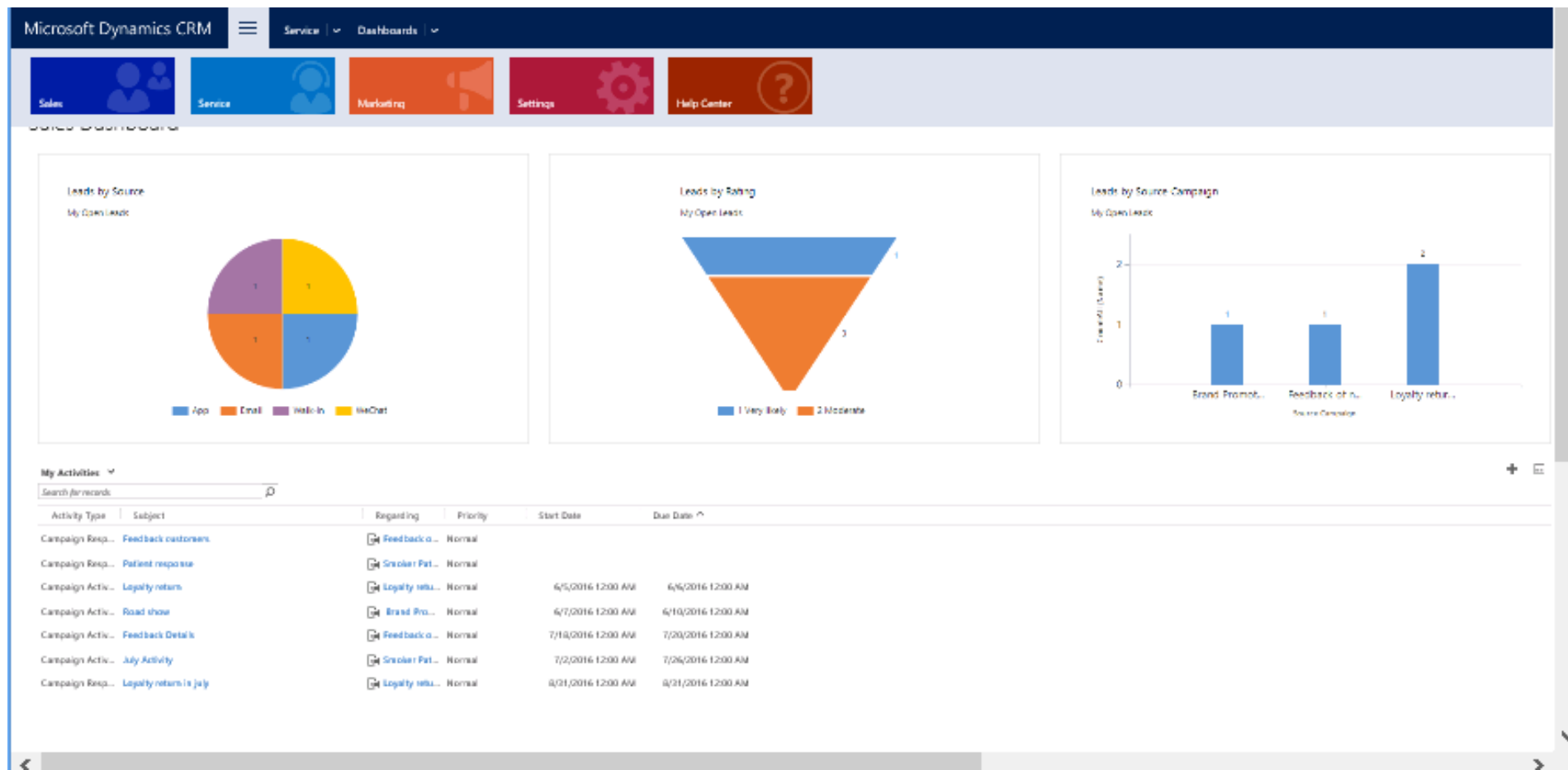


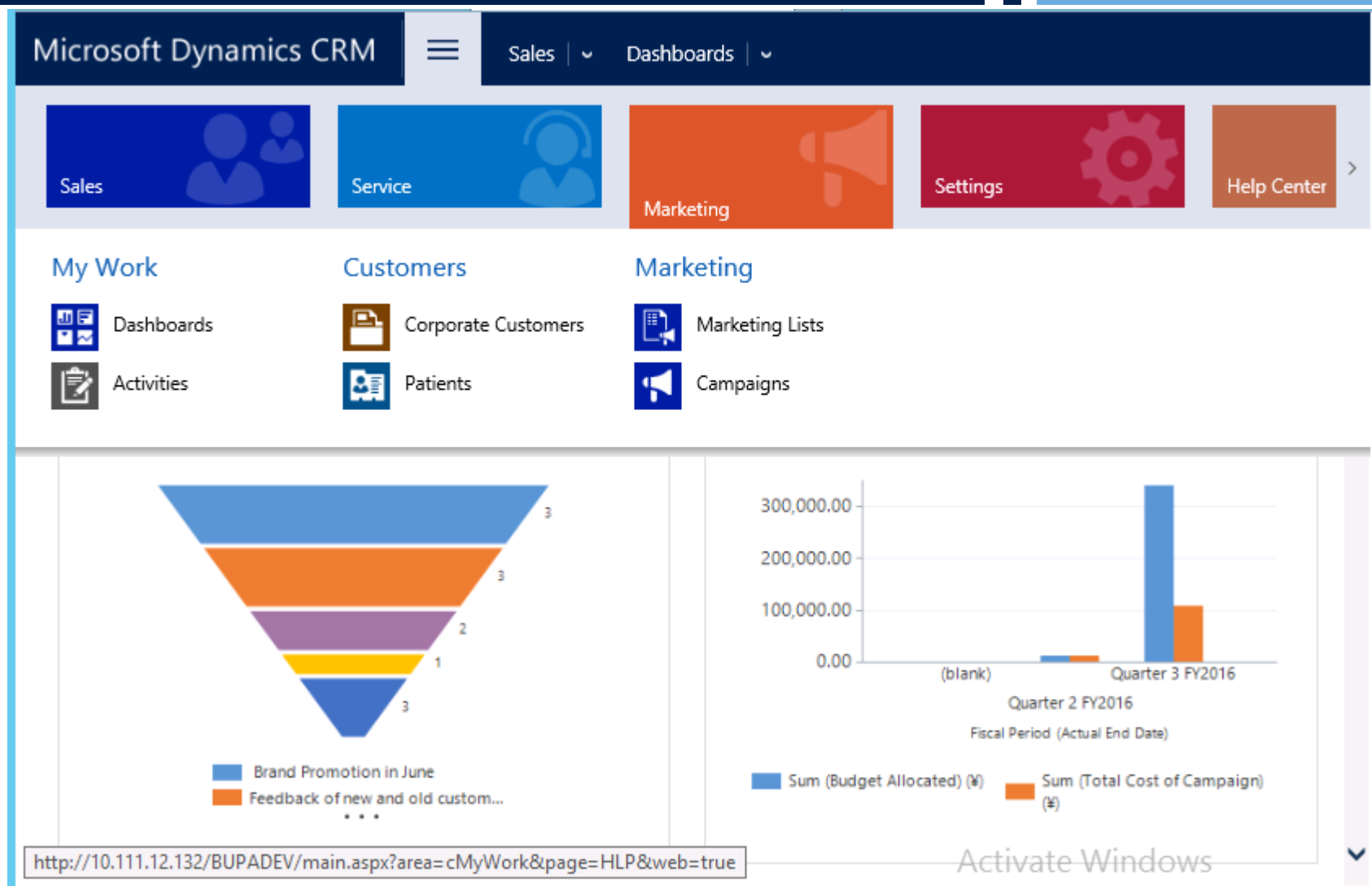
服务管理



Bupa CRM整体介绍

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The screenshot displays the Microsoft Dynamics CRM interface for Marketing Lists. On the left, a sidebar shows a list of marketing lists under 'Active Marketing'. The '40-50 age' list is highlighted with a red box. The main window shows the details for the '40-50 age' marketing list.

Marketing List Details:

- Name:** 40-50 age
- List Type:** Dynamic
- Purpose:** Brand Promotion
- Targeted At:** Patient
- Source:** WeChat
- Currency:** RMB
- Modified On:** 8/2/2016 10:35 AM
- Cost:** ¥30,000.00
- Last Used On:** 8/2/2016
- Locked:** No
- Owner:** Stock zhou

Summary:

Patients:

Full Name ↑	Mobile Phone	Business Ph
No Patient records found.		

Microsoft Dynamics CRM

Marketing

Campaigns

NEW

NEW TEMPLATE

EMAIL TEMPLATE

DELETE

EMAIL A LINK

RUN REPORT

EXCEL TEMPLATES

My Campaigns

Name	Campaign ID
Brand Promotion in June	BP2016060001
Aug Wechat Event	AWE2016060001
Feedback of new and old c...	BPC2016060001
Loyalty return in july	bp2016060001
Media AD	MAD2016060001
Smoker Patient Campaign	SPC2016060001
test	CMP2016060001

Microsoft Dynamics CRM

Marketing

Campaigns

Brand Promotion in June

NEW

DEACTIVATE

DELETE

COPY AS CAMPAIGN

COPY AS TEMPLATE

ASSIGN

SHARE

EMAIL A LINK

CAMPAIGN : BUPA CAMPAIGN

Brand Promotion in June

Template

No

Estimated Revenue

¥50,000.00

Status Details

Proposed

Bupa Campaign

CAMPAIGN

Name	Brand Promotion in June
Campaign ID	BP2016060001
Currency	RMB
Online/Offline	Offline
Campaign Type	Event
Expected Response(%)	70

SCHEDULES

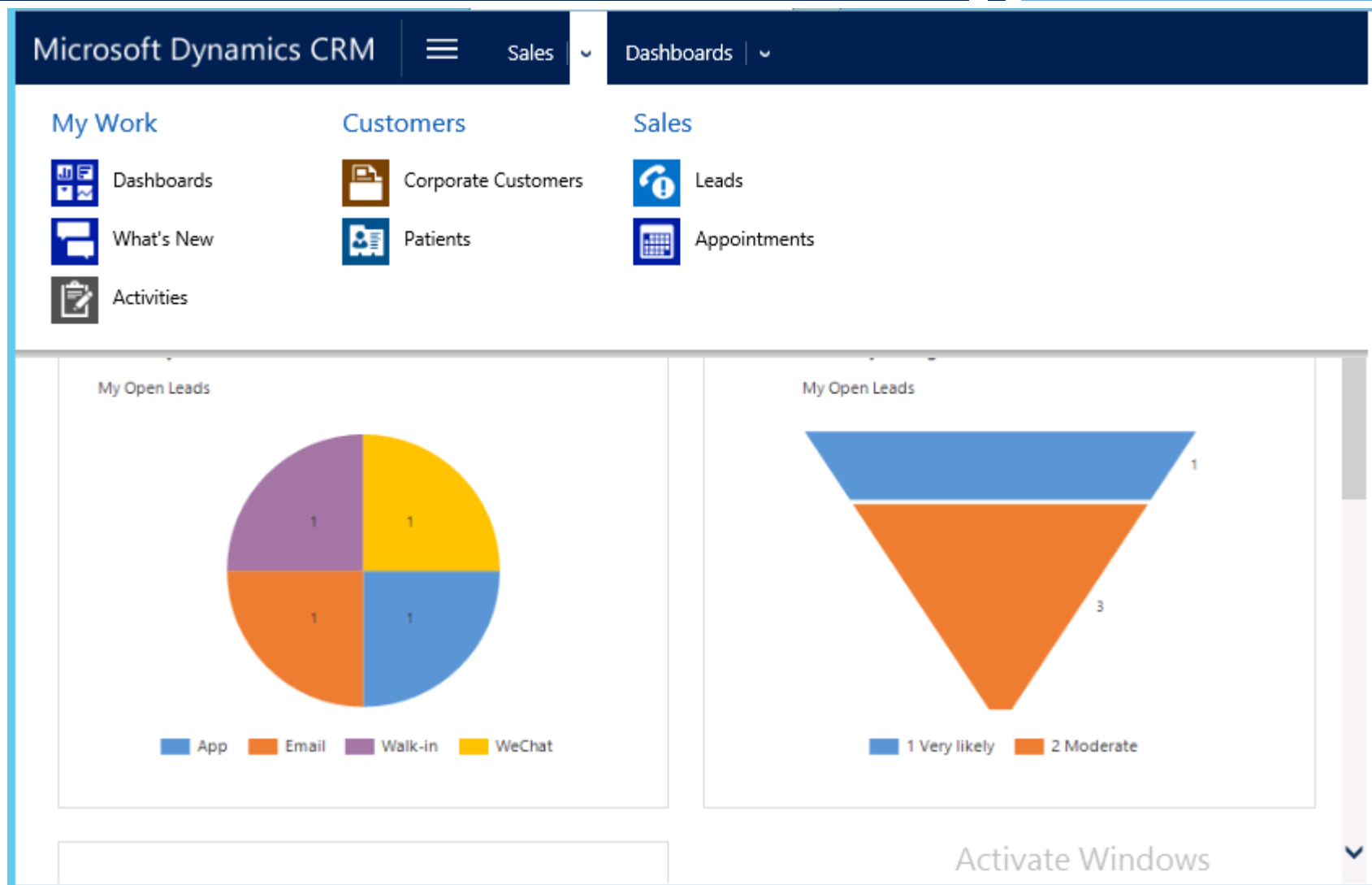
Proposed Start	6/1/2016
Proposed End	6/5/2016
Actual Start	6/1/2016
Actual End	6/5/2016

FINANCIALS

Activity Cost	¥0.00
Misc. Cost	¥10,000.00
Allocated Budget	¥10,000.00
Total Cost	¥10,000.00

DESCRIPTION

Brand Promotion in June



The screenshot displays the Microsoft Dynamics CRM interface. The top navigation bar includes 'Sales' and 'Leads' menus. The left sidebar shows a list of topics, with 'Brand Promotion response' highlighted. The main content area shows a lead record for 'Zhang Iva' with the status 'Active (Active)'. Below the lead name, there is a 'Summary' section with 'CONTACT' and 'Patient Info' details. The 'CONTACT' section includes fields for Topic, Patient, Name, Business Phone, and Email. The 'Patient Info' section includes fields for Company and swire.

Microsoft Dynamics CRM

Sales | **Leads**

My Open Leads

Search for records

Topic

- Mr Liu has stomachache
- Feedback customers21
- Loyalty return in july
- Brand Promotion response**

LEAD

Zhang Iva

Lead Source: APP | Status: New Lead

Active (Active) | Close

✓ Capture Summary | Brand Promotion response:

Summary

CONTACT

Topic *	Brand Promotion response
Patient	--
Name *	Zhang Iva
Business Phone	18098762345
Email	IvaZhang@swire.com

Patient Info

COMPANY

Company +	swire
-----------	-------

Open

Microsoft Dynamics CRM
Sales Patients

+ NEW EDIT ACTIVATE

Active Patients

✓ Patient ID ↑	Full Name
000000017	Patient3 UAT
000000018	Patient4 UAT
000000019	
000000020	Patient5 UAT
000000021	Patient6 UAT
000000022	ALF UAT
000000023	ALF2 UAT
000000024	ALF3 UAT
000000025	Manyu Xiaoo
000000026	uat demo
000000027	doufu Mapo
000000028	
000000030	CRM TEST
000000033	
✓ 000000035	TEST CRM

Microsoft Dynamics CRM
Sales Patients TEST CRM

+ NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE SWITCH PR

PATIENT : CONTACT
TEST CRM

Summary

BASIC

Full Name *
Title
Home Phone
Mobile Phone
Email
Nationality
City
District
Address
Occupation
Type

TEST CRM
MR
22336655
19921213212
aidha@aoiaow.com
--
天河区
广州
广州大道中1号C座2001
Actor
--

PERSONAL

Birthday
Gender
Marital Status
Has Baby
Smoker
Alcohol
Exercise per week
Disposable income
Family Information
Hobby

4/8/1989
Male
--
No
No
Yes
3
--
CRM^TESTIN
--

Microsoft Dynamics CRM
Sales
Appointments

TASK
EMAIL
APPOINTMENT
PHONE CALL
LETTER
FAX
SERVICE ACTIVITY
CAMPAIGN RESPONSE

All Appointments
Due: All

Appointment ID	Patient
8 32 1	(No name)
5 77 1	uat den
5 705 1	(No name)
5 685 1	bookin
5 68 1	(No name)
5 649 1	bookin
5 63 1	(No name)
5 505 2	Patient
5 5 1	(No name)
5 1 1	bookin
201608240930-GZ01-...	TEST C
10 36 1	ALF UA
10 30 1	Manya

Microsoft Dynamics CRM
Sales
Appointments
201608240930-GZ01...

SAVE
MARK COMPLETE
CLOSE APPOINTMENT
CONVERT TO
RECURRENCE
DELETE
EMAIL A LINK

APPOINTMENT
201608240930-GZ01...
Priority Normal
Status Open

Appointment (Active)
Visit
Close

Get Phone Number [click to enter](#)

✓ Appoint a Date* 8/24/2016 12:00 AM

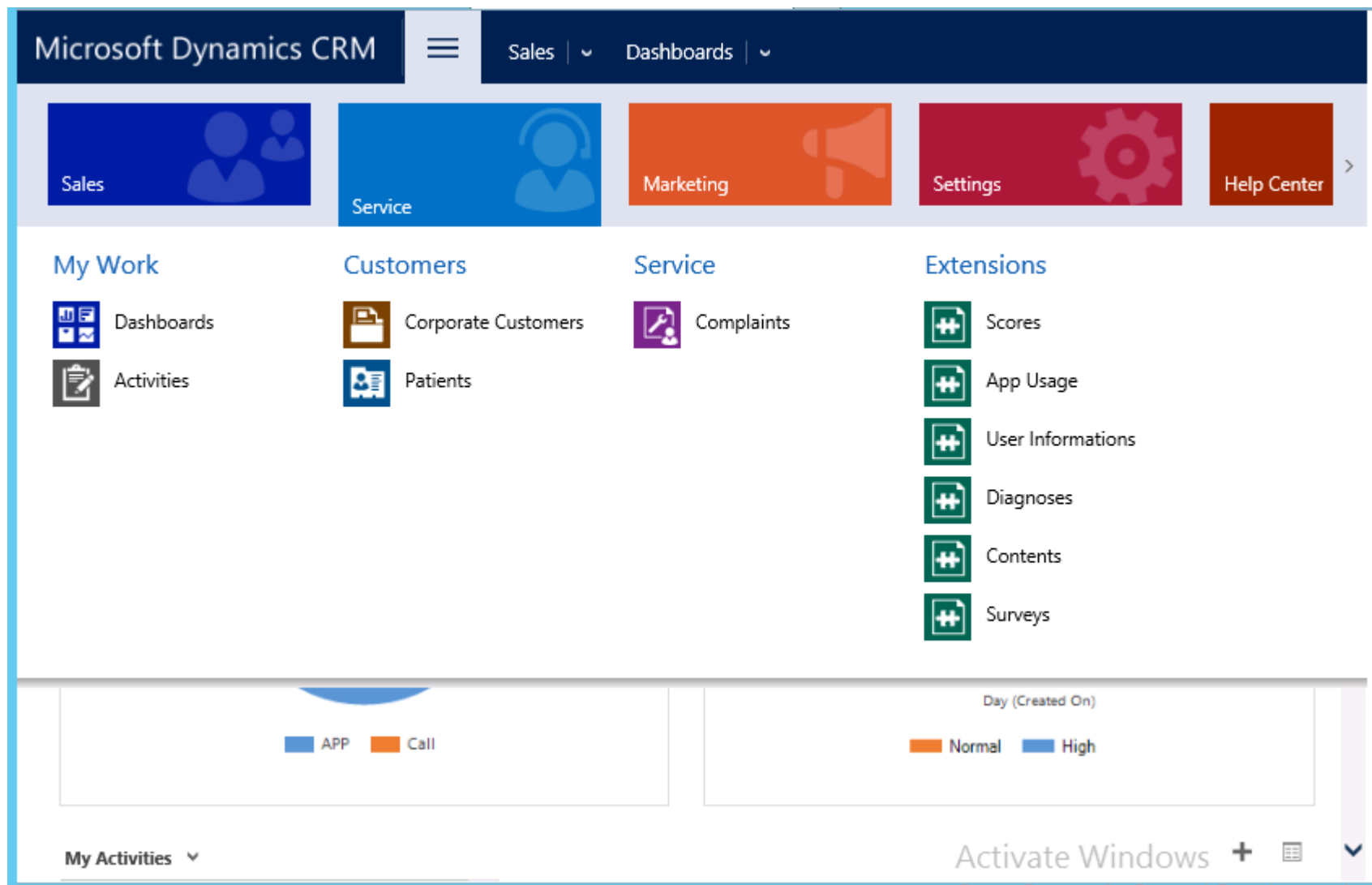
✓ Choose a Department* Family Medicine GZ01

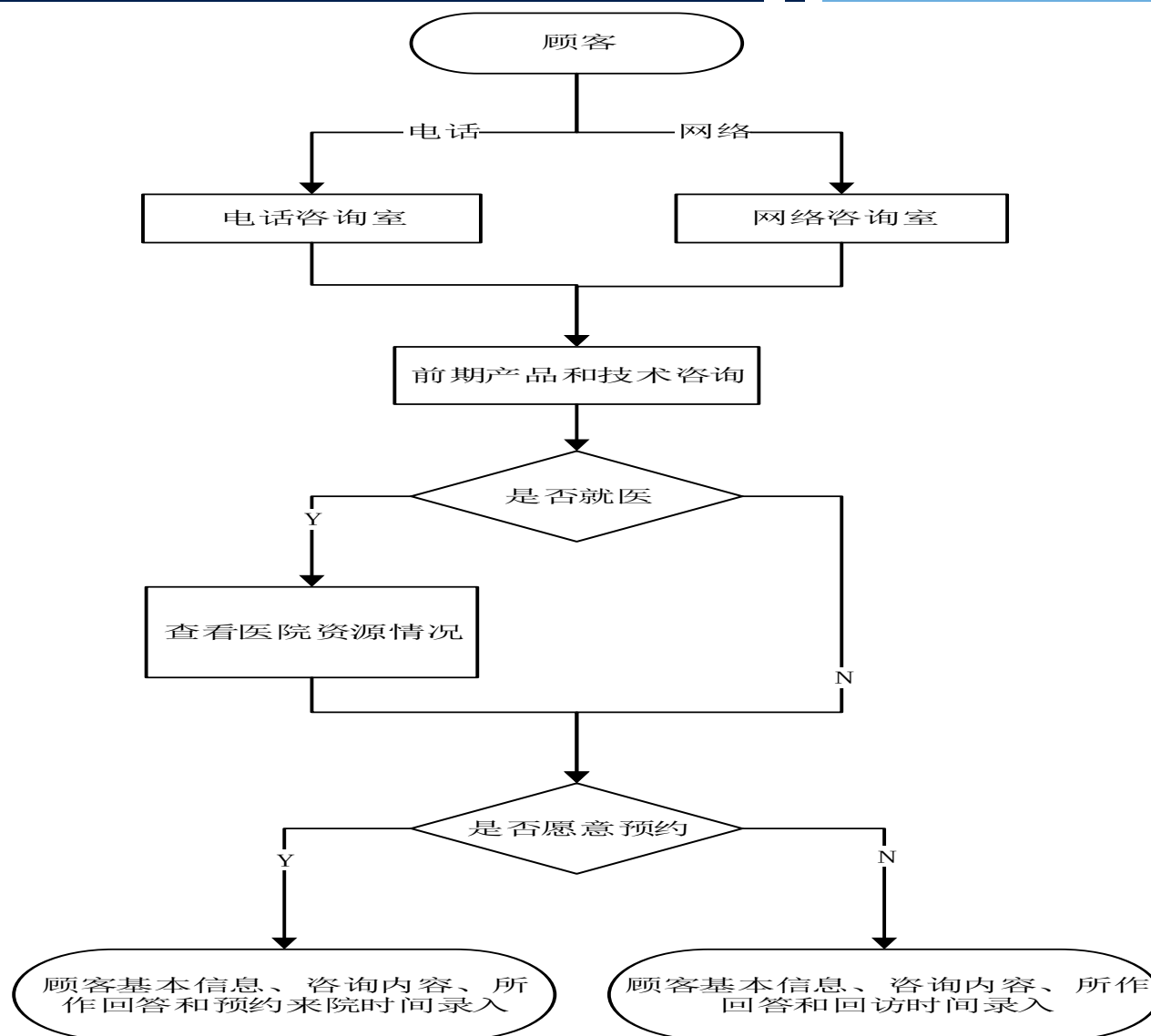
✗ The duration of the appointment is invalid.

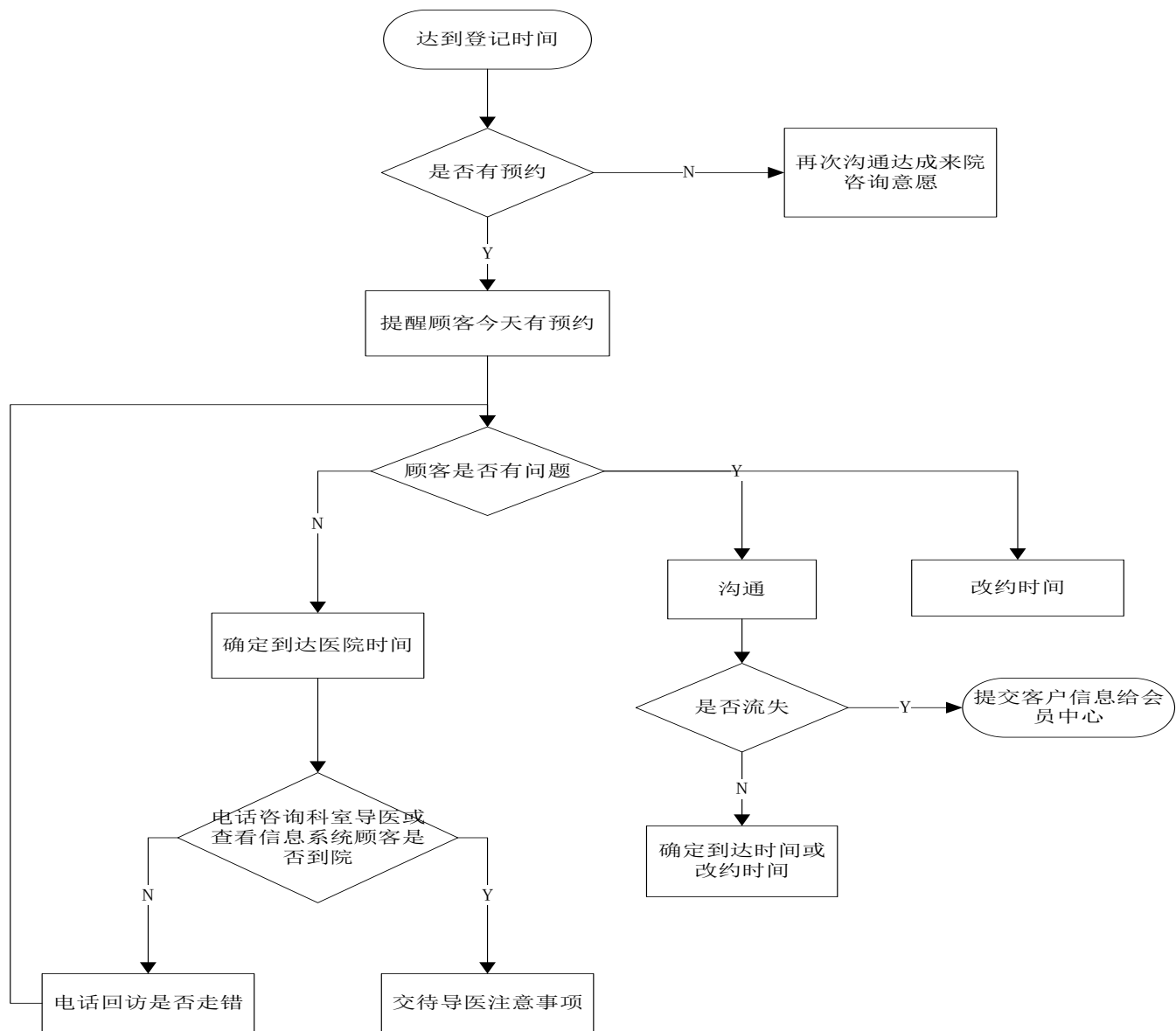
Patient ID 000000035
Birthday 4/8/1989
Gender Male
Mobi 19921213212
Email aidha@aioaw...

City 天河区
Clinic General Hospital H5
Department Family Medicine GZ01
Doctor Dr John Clinican
Appointment Type --

VISIT







The screenshot displays the Microsoft Dynamics CRM interface for managing complaints. The top navigation bar includes 'Service' and 'Complaints' menus. The left sidebar shows a list of active cases, with 'Nurse poor attitude' highlighted. The main view shows the details of this case, including its status, priority, and a list of case details.

Microsoft Dynamics CRM | Service | Complaints | Nurse poor attitude

SAVE & ROUTE | NEW | CREATE CHILD CASE | RESOLVE CASE | CANCEL CASE

COMPLAINT : CASE

Nurse poor attitude

Priority: Normal | Created On: 9/2/2016 9:45 AM | Status: In Progress | Owner: Stock zhou

Identify (Active) | Research | Resolve | Next Stage

CASE DETAILS

Complaint Title *	Nurse poor attitude	Complaint ID	PBC-00038-W5W2
Patient *	Manya Xiaoo	Type	Service
Gender	Male	Age	36
Source Channel	Call	Date	6/21/2016
Mobile Phone	13914026753	E-mail	Manya.Xiaoo@163
Department	Family Medicine G	Staff Name	Adam COLLINS

Active



基于互联网时代的医院CRM方案简介



和睦家及Bupa医疗机构成功案例介绍



Tectura 公司简介



Q&A

WE DELIVER

高效项目实施
绩效提升
整体竞争力

WE ARE

亚洲区最大的软件
咨询服务公司

WE SERVE

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OUR INSIGHT.**

全球1,400 多名员工
60多个分公司
分布在20多个国家

全球6,000 多家客户

战略联盟合作计划
使业务拓展到45个国家

本地服务和全球专家资源支持
范围覆盖全球六大洲

行业专家和行业方案

- 致力于微软集成的商务管理解决方案:

- ERP:

- Microsoft Dynamics Ax

- Microsoft Dynamics Nav

- Microsoft Dynamics GP

- Microsoft Dynamics SL

- CRM

- Microsoft Dynamics CRM

- 微软前后台的技术和微软技术构造的集成

- 主要行业的解决方案领域

- 零售

- 生命科学

- 装备制造

- 政府

- 分销

- 教育

- 包装

- 医药卫生保健

- 服装

- 专业服务

- 航空航天

- 建筑

- 石油/燃气

- 流程制造

Microsoft Dynamics认证

这是微软对软件合作伙伴的最高标准，
它们展示出：

- 开发质量
- Microsoft Dynamics产品兼容性
- 成功实施
- 客户推荐

"This milestone demonstrates Tectura's commitment to delivering leading solutions and expertise for our customers," said Doug Kennedy, vice president, Microsoft Dynamics Partners. "We congratulate Tectura for meeting Microsoft's highest standards of software quality and earning the CFMD distinction."



ACHIEVING CFMD
CERTIFICATION

为Microsoft的领先业务解决方案增添价值

多年来，Tectura 收到Microsoft 的诸多赞誉与认可. 现做一历史性的总结:

- 核心集团
(1 % 的Microsoft Dynamics 顶级合作伙伴)
- 总统俱乐部奖
- 主席俱乐部奖
- 鹰奖
- 客户关怀卓越奖
- 优秀客户奖
- 忠诚客户奖
- 美国成长最快合作伙伴 奖
- IMPACT 奖- ERP 年度解决方案(加拿大)
- 年度制造业合作伙伴奖(美国)
- “ 百万美元 ”俱乐部奖
- MBS 年度全球合作伙伴奖(全球)
- 年度最佳合作伙伴奖- (大中国区)
- 最佳合作伙伴奖(加拿大)
- 最佳销售认可奖(大中国区)
- 年度最佳合作伙伴 奖(亚太区)
- 年度最佳合作伙伴奖(大中国区)
- 年度最佳合作伙伴 奖 (香港)
- 年度最佳合作伙伴 奖 (北美)
- 年度最佳合作伙伴奖(美国)
- 年度最佳合作伙伴奖 (全球)
- 年度全球先驱奖
- 年度技术创新奖(大中国区)

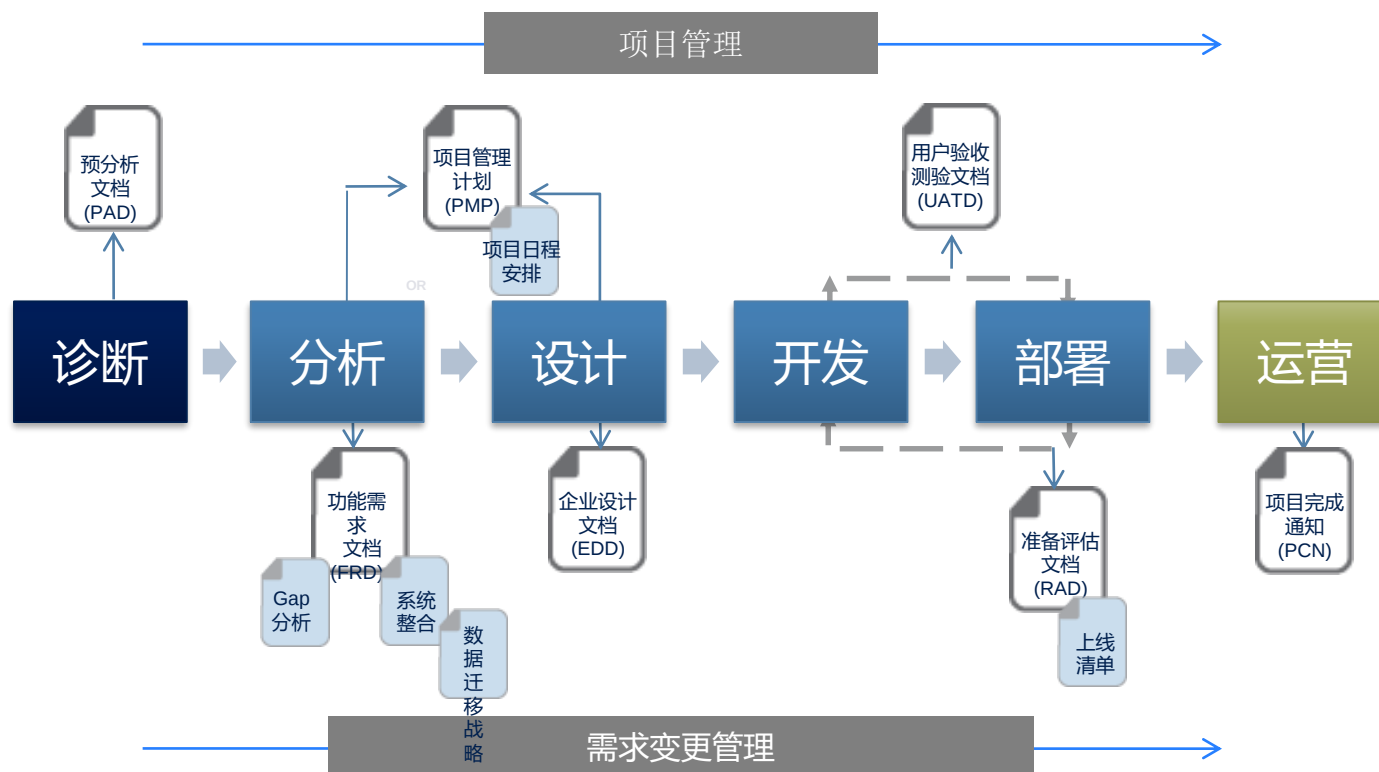


Microsoft® Partner

Gold Enterprise Resource Planning
Gold Customer Relationship Management

提供值得信赖的实施方法

TECTURA®



来自客户的信任

TECTURA®

制造	分销贸易	零售	服务	CRM/项目型销售管理
   美心集團      window fashions  	 基本生活  Carrefour 家乐福    Save money. Live better.  嘉士伯   雷克萨斯  It's all about value	  Eu Yan Sang    make.believe    UNFORGETTABLE MOMENTS  戴梦得  瑞恩钻石名店 	 北京顺义国际学校 INTERNATIONAL SCHOOL OF BEIJING  招商信诺 Cigna & CMB  和睦家医疗 United Family Healthcare  Ocean Park Hong Kong  MGM 美高梅    CAT Logistics 	  燕京啤酒  ZRP 中荣印刷 PRINTING & PACKAGING     RainKing 瑞恩钻石名店  produce sunshine

- Tectura独特之处

Microsoft
Dynamics
专业户

行业专家
全球化

建立在客
户口碑的
卓越声誉

同样，我们也能为您缔造非凡！



基于互联网时代的医院CRM方案简介



和睦家及Bupa医疗机构成功案例介绍



Tectura 公司简介



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