



CRM
Features



Introduction

The CRM apps included in fimble offer a variety of data management, automation, communication and marketing tools to increase customer engagement, frequency and retention.



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This short presentation includes the most important features of the CRM tools offered by fimble.

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Overview

The following features allow to efficiently acquire, serve & reengage with your customers.

Data Management

Customer & Lead management, data collection and more

Offers & Coupons

Advanced system for offers and coupons

Upselling

Basic and advanced upselling features to increase the average ticket

Data Segmentation

Static & Dynamic data segmentation for accurate data filtration

Rewards

Extensive rewards program & gift management

Communication

Omni-channel communication for automated, transactional and bulk communication

Unit Management

Business unit and franchise management

Detailed Analytics

Sales analytics, customer profiling and real-time dashboards

Other tools

Various tools that will assist in managing your workflow more efficiently

Data Management

Any successful CRM solution starts with efficient data management.

- **Customer management** - Dynamic management of customers with detailed information and profiling data, featuring a customer dashboard to give you essential insights and behavioral data at a glance.
- **Lead management** - Visitors who are not placing an order but engage in other activities such as sending feedback, participate in contests etc. are automatically saved as leads for future engagement.
- **Data Collection** - Dynamic forms that are used for surveys, customer satisfaction forms or even additional profiling. The system collects all the data under the customer file, which is then used for segmentation & reporting. In case the data does not correspond to an existing customer, a lead is automatically created that can be used for promotional campaigns.
- **Feedback** - Receive customer feedback through online form. In case of a low score, the system automatically creates a ticket as well. Form submission can reward points or coupons.





Offers & Coupons

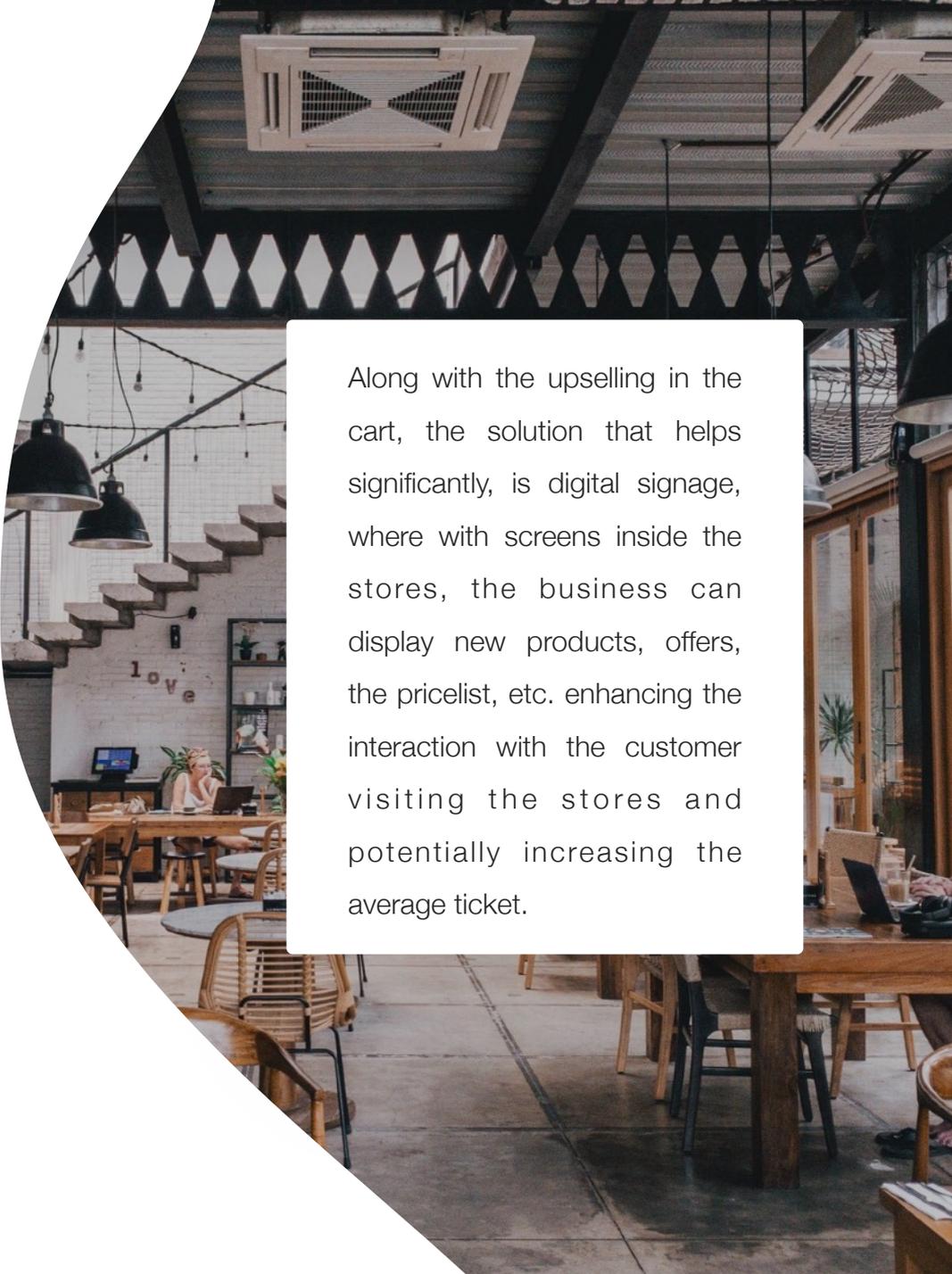
It is imperative for the system to be able to support demanding marketing promotional requirements.

- **Offers** - Advanced offering system with multiple conditions such as schedule, basket total, items in basket, payment method and more including several types of offers such as traditional Guided offers, Coupon-triggered offers as well as Automatic that activate automatically on the basket when items are placed without requiring the customer to go through a process of selecting products in steps.
- **Coupons** - Recurring and one-off coupons with unique coupon code generation and optional assignment to a customer. Additionally, coupons can be linked with a ticket type so when a customer for example files a complaint for late delivery, the system will automatically -after agent confirmation- assign a 10% off the next order coupon to the customer's account. When that customer calls again or logs in, he/she will have this coupon available at the checkout.

Upselling

Products marked as "Cross-selling" are displayed in the cart as a suggested addition when the product has not been selected already.

Furthermore, upselling mechanism allows to set conditions and link products and combos to allow upselling upgrades. For example, when customer opens a meal page, instead of just displaying an "Add to basket" button it can also display a "Go large for \$1" option to upgrade instantly and add it to the basket. Upselling also supports creating popup windows for displaying product banners on the menu, checkout or both.



Along with the upselling in the cart, the solution that helps significantly, is digital signage, where with screens inside the stores, the business can display new products, offers, the pricelist, etc. enhancing the interaction with the customer visiting the stores and potentially increasing the average ticket.

Data Segmentation

The segmentation of customers, leads, stores and generally all main entities within the system, provides the possibility of better offer and communication targeting as well as statistical reporting. Fimble performs segmentation in the following 3 ways:



Static Segments

- Static segmentation created manually via filters provided by the system, for searching records.
- Example; Search for customers who have not ordered for more than 180 days and assign to the segment "Inactive customers".



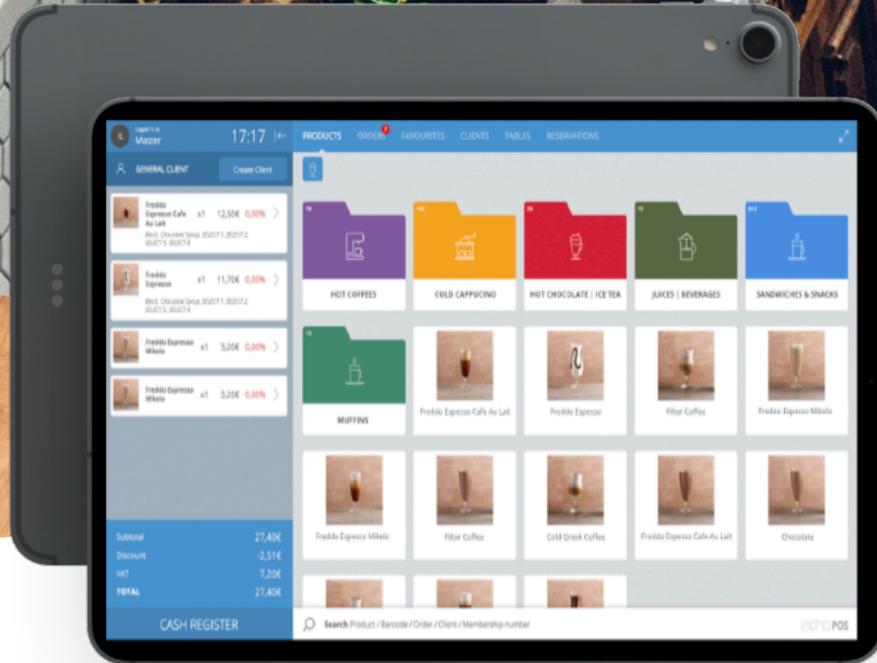
Dynamic Segments

- Dynamic customer segmentation based on automatically modified features.
- Example: Dynamic setting of conditions that includes "customers who place more than 3 orders per month" and automatic assignment to the segment "Loyal customers"



Buying Habits

- Dynamic segmentation of customers based on buying habits.
- Example: Dynamic setting of conditions that includes "customers who order products that include chicken" and automatic assignment to the segment "Chicken lovers".



Rewards

- **Loyalty program** - Flexible loyalty program builder that rewards customers with purchases and actions. The program can define both the way of collecting points as well as their optional redemption with cart discount, gifts, discount coupons or products.
- **Signup bonus** - Fimble also allows to set a signup bonus to increase the loyalty program conversion e.g. 100 points on your signup.

Communication

Automated Communication

At various points of the ordering process, the system sends automated emails or push notifications to the customer for complete transparency during the ordering e.g. acceptance of the order, departure/arrival of the driver etc.

Mass Communication

Mass communication either in all contacts or per segment can be done through the platform or utilizing an interface with a third party system e.g. Mailing list.

Omni-Channel Support

In addition to sending emails, the system provides the ability to send SMS & Push Notifications.

Email tracking

Each email that is sent automatically through the system, is recorded if it was read and how many times for better measurement of the results.

Automatic Communication Archiving

Each communication is recorded not only in the general communication file but also in the customer's tab, so that for example if a call center agent opens the customer file he/she will be automatically informed about the customer's recent communication e.g. received and opened the personalised offer email.

Unit Management

Fimble offers a variety of tools to manage the business units and franchisees and have full control of the network.

- **Unit Management** - Monitor, collect, retain and manage all the critical information of your units and their performance. Collaborate with your franchisees and build a strong / powerful brand together.
- **Content** - Create the necessary forms & checklists, share your files and keep in constant communication with your franchisees and maintain smooth and healthy relationships.
- **Field Audits** - Efficient management and easy creation of your field audits and planned visits with a dedicated mobile app for your supervisors.
- **Training** - Upload your training material, supervise progress, set up exams and issue certificates.
- **Incident Management** - Record and report on the network's incidents
- **Store Manager Portal** - Give your franchisees the opportunity to manage business data directly and increase productivity of each unit.



Detailed Analytics

Detailed reporting provides business insights that allow you to run your business more efficiently.

A big set of reports includes analytics for:

- **Customers & Leads**
- **Sales & Conversions**
- **Products**
- **Feedback**
- **Workflow**
- **Buying Habits**
- **Performance**
- **Campaigns & Events**
- **Tickets**
- **Communication**
- **Discounts**
- **Contests**
- **Rewards & Gifts**

Other tools

Tickets

Manage and monitor all tickets and complaints that enter the system both B2C and B2B so that the detection and resolution of any problems are carried out immediately and efficiently.

Campaign Management

Recording of campaigns performed and planned both online and offline, whose data are evaluated statistically and used by other applications such as Forecast, Scheduling, etc.

Document Management

Dynamic management of files and folders for internal or external use.

Contests

Set up contests, assign gifts and declare winners to increase customer engagement.

Marketing Events

Manage marketing events that impact sales, inventory and staff scheduling and share via an internal calendar.

Tags

All system entities such as customers, stores, products etc. can be tagged to provide an extra reporting dimension.

Competition

Track your competitors and their locations, monitor their prices and offers.

Fimble

Thank you!