



MOBIO

CDP & CRM Platform

Elevate Customer Experience with a
Data-Driven Strategy in the Digital Era

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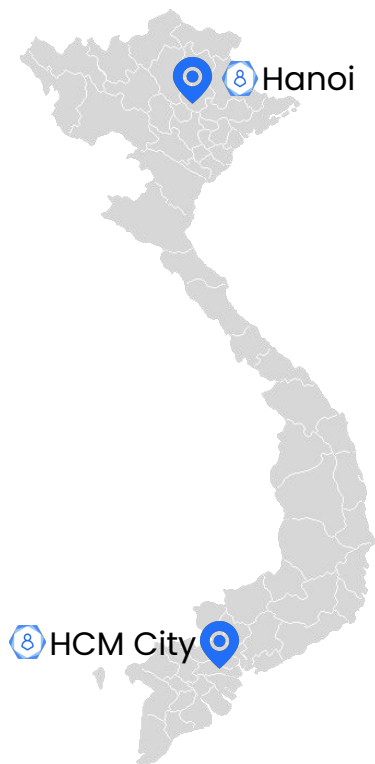
05. Why Mobio?

01.

Who we are

ABOUT MOBIO

All-in-one Platform for Businesses



MOBIO is more than just a technology provider; we are your **strategic partner in digital transformation**. We offer a comprehensive, all-in-one **Customer Data Platform (CDP)** and **Smart CRM** solution designed to empower your Marketing, Sales, and Service teams to work in harmony, all from a single, unified platform.

50+

ENTERPRISES & BIG CORPS
CUSTOMERS

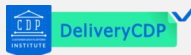
8+

YEARS
OF EXPERIENCE

~100

PASSIONATE
PRODUCT BUILDERS

McKinsey
& Company



12/2022:
Recognized as a
“**Promising
Vendor**” by
McKinsey

12/2022:
Categorized as a
“**Delivery CDP**” in
CDP’s Vendor
List



4/2023: Granted the
“**Sao Khue Award**” in
the Digital
Transformation
Platform category

MartechMap
by Chiefmartec x MartechTribe

5/2023: Appeared
as the first
Vietnamese CDP
on the **Global
Martech Map**

SAFe®
PROVIDED BY SCALED AGILE

10/2025: Recognized
as the 1st successful
case study for SAFe
adoption in Vietnam
by **Scaled Agile**

An All-in-One Platform built with Deep Vertical Expertise

We don't build a one-size-fits-all solution. Instead, we **embed** our deep understanding of each vertical's **distinct data, processes, organizational behaviors, and customer behaviors** into our platform

★ BFSI



Retail & Others



Multi-Industries Corporations



Hospitality & Travel



Real Estate



Integrated Solution Partners



02.

What we do

The Challenges



Lack of **actionable insights**

Ads dependency leads to **high** acquisition cost but **low** conversion rate

Fragmented customer experience

Manual & unmeasurable operational process

The Solution



Unified customer data platform

Pro-actively design your **customer journey**

Hyper-personalized & real-time engagement

Empower sales & service team with **automation & super app**

The Business Impact



Data-driven decision making

Cost optimization & higher conversion rate

Frictionless customer experience & **higher retention rate**

Increased Operational **Efficiency**



32%

Increase of Social CR

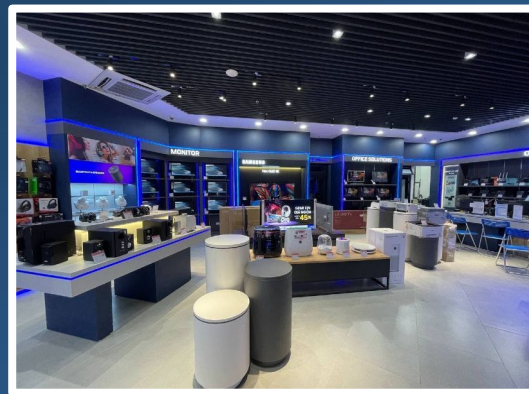
x5

Social Traffic

x5

Average Response Time

Phong Vu is a typical business case of Mobio in implementing the online sales platform and building a comprehensive digital customer journey to level up their customer online shopping experience



[\[Explore this case\]](#)



[\[Explore this case\]](#)

x7

Conversion Rate

20%

Avg. Click rate
per online campaign

2.3M

Loyalty Members

↑ 15% YoY

2.5M

Identified Profiles

↑ 56% to last year

guardian

Guardian has been leverage Mobio Solution to build long lasting relationship with their customer, creating a seamless experience across channels, resulting in boosting retention & advocacy.



Martech (Mobio) helps banks streamline processes, reduce operational costs, enhance work efficiency, and provide a better service experience for customers. Recently, this technology has **tripled sales performance** and reduced calls to customers who do not have immediate needs.

x3

Sales conversion rate

6.6M

Identified profiles

12–16M

Messages per month



[\[Explore this case\]](#)



80%

campaigns are micro-segmented & utilize advanced personalization

Recognized remarkable increase in

Unique offer Redemption Rate & Product Activation Rate



Mobio's solution has been creatively and profoundly leveraged by business units and marketing teams, leading to remarkable growth in **customer engagement**, **offer usage**, and post-registration **product activation rates**.

03.

Our Solutions

Achieving CUSTOMER EXCELLENCE with MOBIO all-in-one solution

Accelerate Revenue Growth & Maximize Personalization:

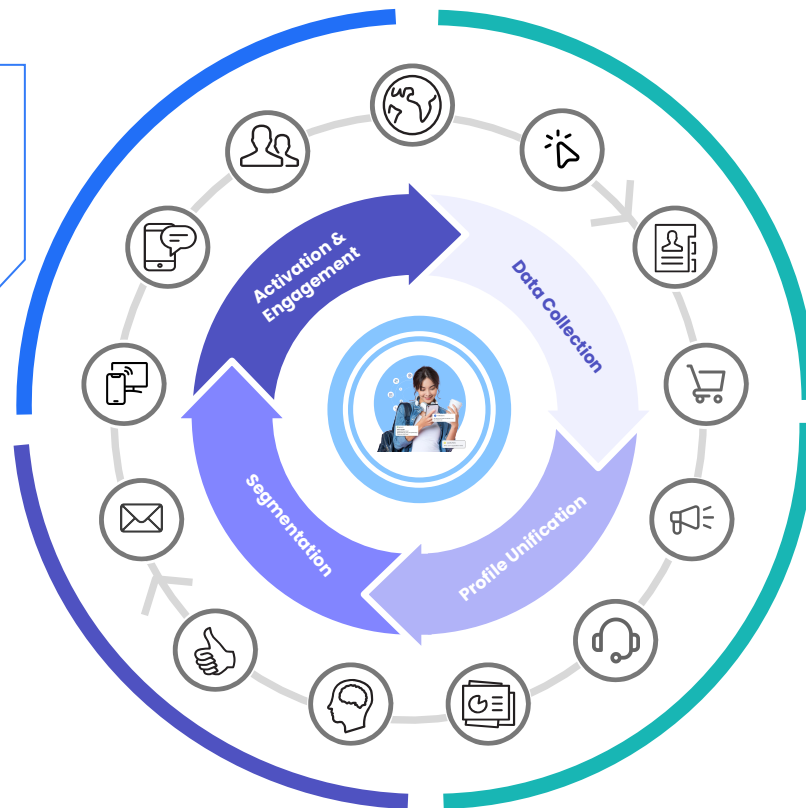
Leverage real-time Customer Data (CDP) to build hyper-personalized Journeys, ensuring highly efficient Ad Spend optimization

Marketing Excellence by Customer Data Platform

Enable Precise Decisions with a "Golden Profile" of Customer Data:

Provide a true 360-degree view and Predictive Analytics to accurately identify High-Value Customers (CLV) and proactively mitigate Churn Risk

Business Insights by Analytics Data Platform



Boost Sales Productivity & Shorten Business Cycle Time:

Equip your Sales team with a powerful CRM suite to professionally manage Pipeline, Opportunities, and Tasks, focusing exclusively on the most qualified deals.

Selling Excellence by Smart CRM for Sales

Optimize Customer Experience (CX) & Reduce Churn Rate:

Unify all service interactions (Tickets, Chat, Call) to enable fast, personalized responses, supported by a robust and easily accessible Knowledge Base

Service Excellence by Smart CRM for Services

Mobio at a Glance: **Architecture - Built for Trust**



Unified Data & Governance

We go beyond collection to normalize and unify data from disparate sources into a single “Golden Profile”. Our platform provides [flexible configurations](#), allowing enterprises to easily customize and enforce their specific data governance policies



Bank-grade Security & Compliance

Our architecture is engineered to meet the most stringent standards, [featuring multi-layered data encryption, robust access controls \(RBAC & ABAC\), and detailed audit logging](#) to ensure the absolute security of sensitive customer data



Flexible Deployment Options

Enterprises maintain complete control over their data. We support every deployment model: from our [convenient SaaS](#) (Mobio Cloud) to a full [On-Premise/Self-hosted](#) installation, ensuring 100% compliance with the enterprise's specific security and data governance policies



API-first & Open Architecture

Built on an 'API-First' philosophy, our platform [seamlessly connects with the client's existing core systems](#) (like Core Banking, LOS, ERP, CRM, etc). We provide robust APIs, Webhooks, and diverse integration options (e.g., database, message queue) to ensure smooth interoperability



High Performance & Scalability

Our architecture is partitioned into [OLTP and OLAP](#) workloads. This ensures real-time speed for operational tasks (OLTP) while optimizing resources for heavy data processing and analytics (OLAP). Its [horizontal scaling architecture](#) allows to add capacity seamlessly, guaranteeing performance even during peak loads

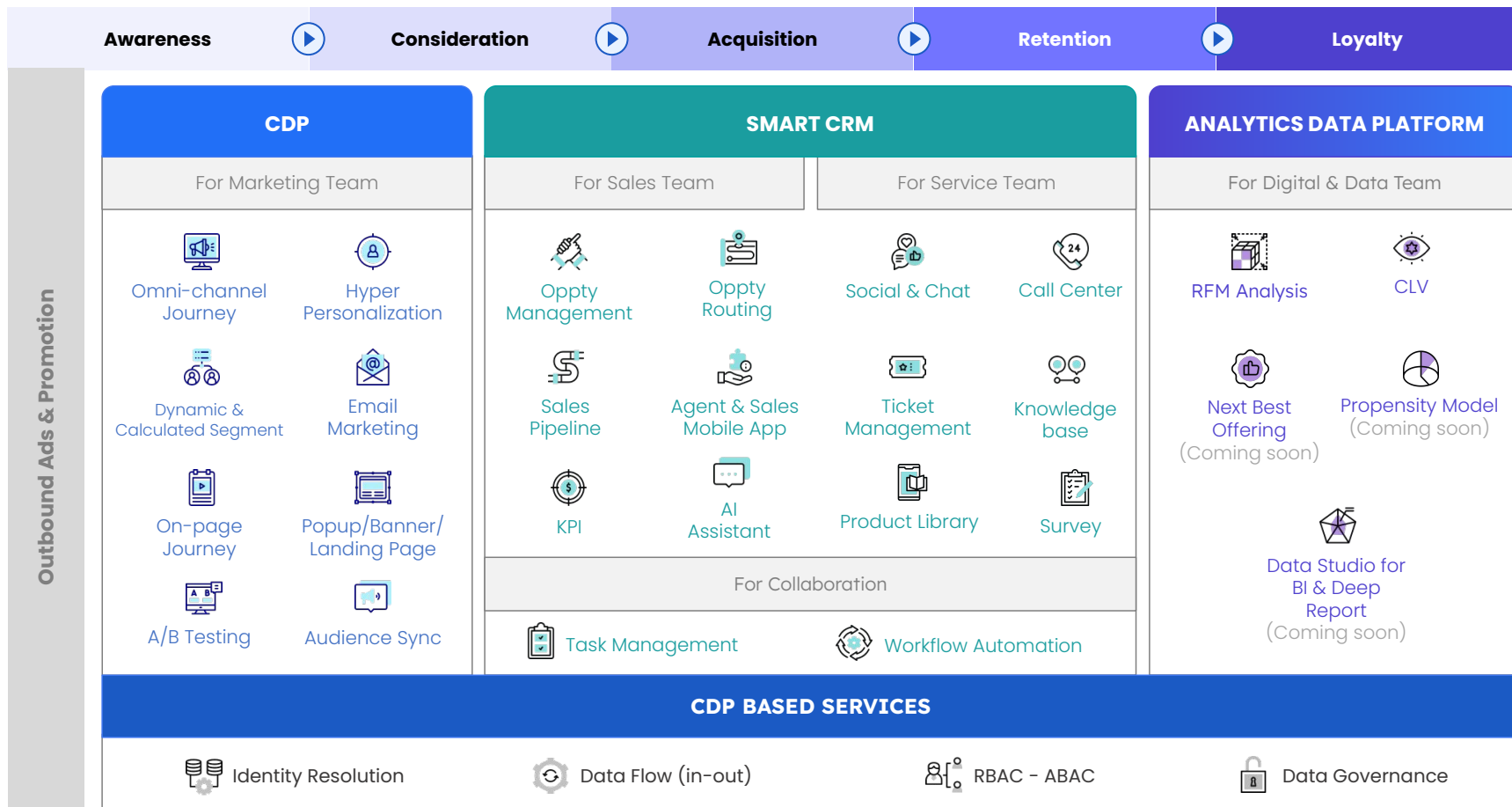


Future-proof & AI-ready

We don't just solve today's challenges. Our roadmap is focused on [AI capabilities & Low-code/No-code workflow](#) to enable unique business processes, ensuring your investment today continues to deliver value for years to come

Mobio at a Glance: Features

List of main features



| Activation CDP

ACTIVATION CDP | Accelerate personalized customer experience

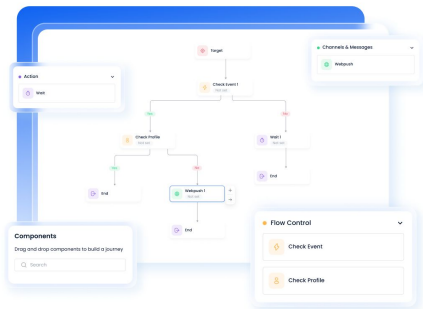
ALL-IN-ONE PLATFORM

For Marketing Team

Activation CDP helps you to create an end-to-end customer experience and boost customer retention effectively.

[Get Started Free](#)

[Learn more](#)



HIGHLIGHT FEATURES

What can I do with Activation CDP?



Omnichannel Journey



Customer Segmentation



Hyper-personalization



Landing Page Builder



Email Builder



Pop-up Builder



Ads Audience Sync



A/B Testing



Marketing Dashboard

WHY ACTIVATION CDP?

Deliver personalization CX at scale

Implementing personalization via marketing automation enhances both customer satisfaction and business outcomes. Evaluating marketing effectiveness allows for tracking success metrics and linking revenue directly to marketing efforts.



Automation



Personalization



Measurable

Realtime engagement

Analytics Capabilities

Ads dependency

CAC

CPL

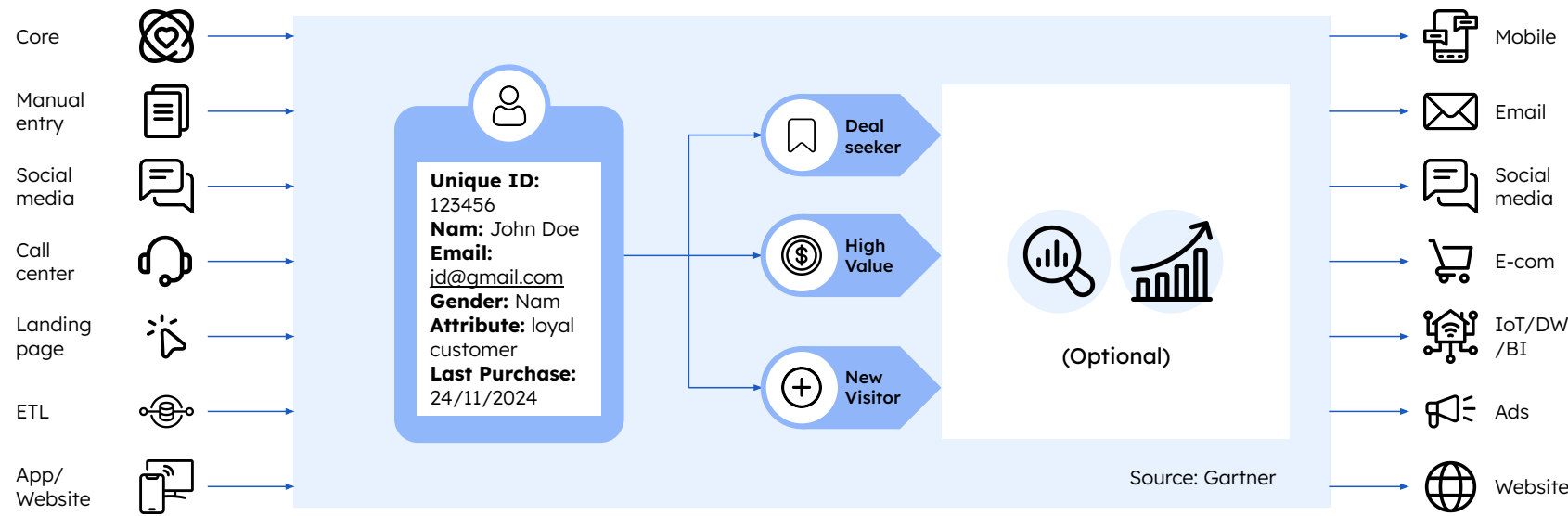
CPM

Trusted by



CORE FUNCTIONS OF A CDP ACCORDING TO GARTNER

(Optional)				
Data Collection	▶ Profile Unification	▶ Segmentation	Prediction & Decision	▶ Activation
- Gather customer data from multiple sources - Stores in usable format	- Associates ID to person - Enrich with external data - Deduplicates	Define and apply customer segments	- Out-of-the-box models - Import custom R, Python - <u>Content/offer optimization</u> - <u>Next-best recommendation</u> - <u>Journey analytics</u>	Connects external systems



Activation CDP = Marketing Automation + Engagement Platform + Customer Data Platform

	Marketing Automation	Engagement Platform	Activation CDP
Architecture	No data engine.*	Built-in basic data engine.	Built-in advanced data engine.
Data Processing	Attribute structured data. Sourced from: CSV, XLSX file imports, CRM, 3rd party.	Behavioral semi-structured data.. Sourced from: • Website behavior tracking • Mobile app behavior tracking	All types of customer data: • From offline to online • From attribute to behavioral data
Data Storage & Processing Capabilities	Reports only available after campaigns end. No event tracking and storage.	Real-time reports. Data stored for 2-3 months. No deep processing to build 360° profiles	Real-time reports. Longer data storage (6-12 months). Capable of unifying and processing data to build 360° profiles.
Personalization Capabilities	Basic Personalization (field insertion, macro segmentation)	Personalization based on real-time tracked data.	Advanced Personalization capabilities (Real-time, one-to-one & combination of online & offline data).
Business Value	Improve productivity thanks to automation	Instant interaction across digital channels, driving conversion rates (CR) & reducing drop-offs	Create automated end-to-end customer journeys across all touchpoints with 1-1 personalization.

CDP empowers seamless customer journey



Customer

Considering



Customers



Advocacy

Customer behavior

Product Intent

Transaction

Membership
signup

Online
engagement

Upsell/
Cross-sell

Social
engagement

Service
interaction

Voucher
redemption

Transaction

Touchpoints



Search/Social



Online/Offline
store



POS & CDP



Website portal/
Mobile app/
Zalo mini app



Personalized
Email



Social



Call Center



SMS/ZNS



Online/Offline
store

HAPPY

SATISFIED

NEUTRAL

UNSATISFIED

ANNOYING



Customer expectation

Find
products to buy

Buy
effortlessly

Receive
special offer

See products,
check loyalty
points

See something
new (products
or vouchers)

See if there's a
promotion/sale

Their problems
being solved

Receive
vouchers

Redeem
voucher easily

| Smart CRM

SMART CRM | Smarter to earn more, while spend less

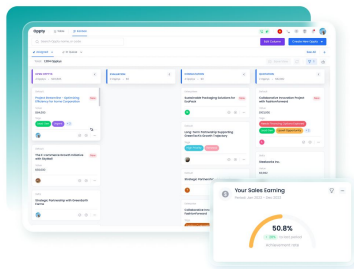
Smart CRM

For Sales & Service Team

Accelerate team's performance through a range of different technology. Connect and interact with customers in real-time, focus on retaining customers and expanding purchasing lifecycle.

[Get Started Free](#)

[Learn more](#)



HIGHLIGHT FEATURES

What can I do with Smart CRM?

 Oppty Mngt & Oppty Routing

 Oppty Automation

 Sales Pipeline

 KPI tracking & reporting

 Social & Chat

 AI Assistant

 Ticket Mngt & Ticket Routing

 Call Center

 Task Management

 Form Builder

 Workflow Automation

 Knowledge Base

WHY SMART CRM?

Streamline operation process

Achieving customer success requires time and empathy with an effective workflow. Our solution follows these customer service essentials that help build long-lasting customer relationships.

 Automation

 Timeliness

 Evaluation

Utilize customer satisfaction & retention

Sales volume ▲ Lead conversion rate ▲ Revenue per rep ▲

Lead time ▼ Close time ▼ Contract renewal ▲ CPL ▼

ART, FRT ▼ Ticket time resolved ▼ Loyalty engagement ▲

Trusted by

 MSB

 HDBank

 PVcomBank

 EXIMBANK

 guardian

 YÊN TỬ
A Multi-Cultural Heritage Site

 PHONGVU.VN

 SUNWORLD
THE WORLD OF WOW

 SUN HOSPITALITY GROUP

 ĐO SƠN DRAGON OCEAN

Smart CRM = Traditional CRM + Low-code Workflow + AI Capabilities

	Traditional CRM	Smart CRM
Architect	Has a data engine, but limited format support.	Has a built-in advanced data engine, supports diverse data formats, capability for new AI Era
Input Data Sources	Structured data. (e.g., Excel files)	Structured, semi-structured, and unstructured data . (e.g., event data, audio, images, etc.)
Automation Capabilities	Basic automation based on schedules or data changes within predefined objects	Advanced automation with low-code workflow capabilities, data change within customs objects , and AI Bot support .
Target Users/Roles	Sales team and Customer Service team.	Sales team and Customer Service team. Agency team. AI Agent
Recommended use cases	Traditional CRM boosts sales and service productivity with tools for pipeline management, performance tracking, task management, and customer interaction.	Smart CRM goes further, automating routine tasks in sales and service processes and potentially replace low-level labor by leverage Workflow Automation and AI capabilities.

Smart CRM = Traditional CRM + Low-code Workflow + AI Capabilities

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Empower your sales force with an all-in-one Super App

Super App for Sales & Agents



Seamlessly manage customers & opportunities, anytime & anywhere



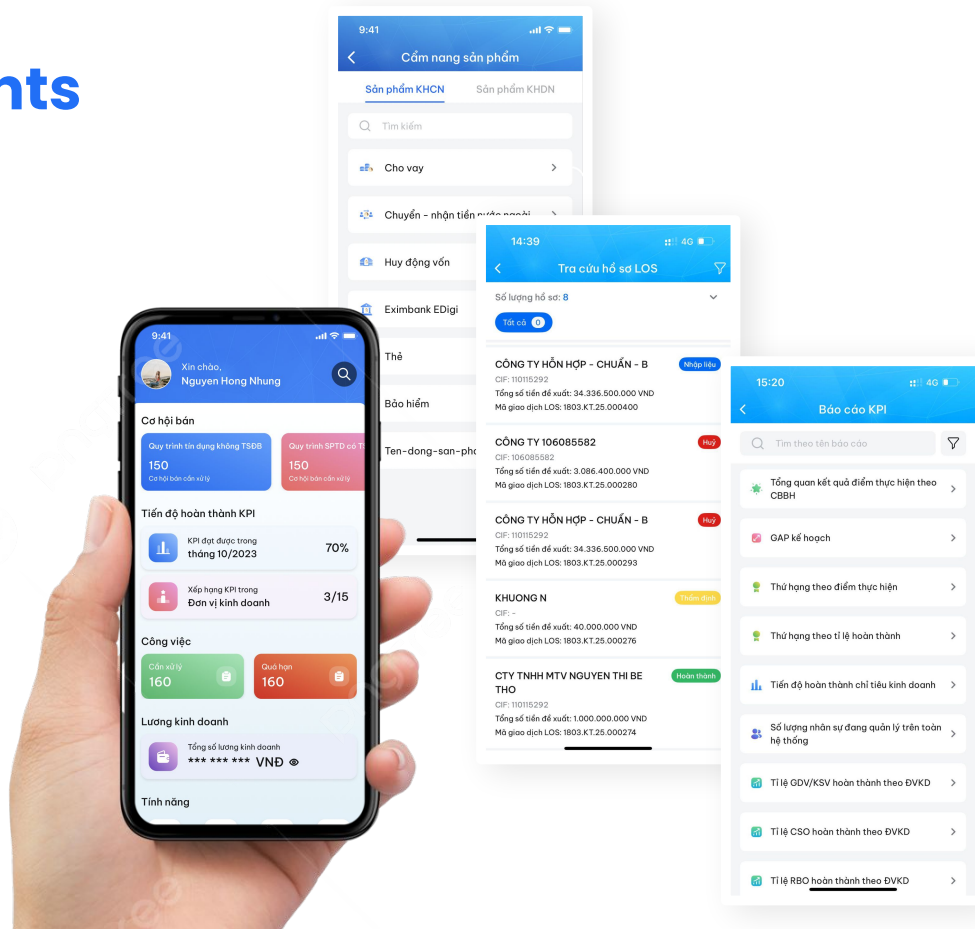
Instant access to Sales kits, Credit Reports & Loan Status



Track, Plan, and Achieve Your KPI with Data-Driven Insights



Empower team collaboration to accelerate Sales



04.

Delivery Plan

Leverage our Professional Services for Your Success



01

BUY

02

IMPLEMENT

03

OPERATE



CONSULTING SERVICE

IMPLEMENTATION SERVICE

MANAGED SERVICE (optional)

PLATFORM LICENSE

- ✓ Project initiation consulting
- ✓ Identify in-out data & customer segments
- ✓ **[CDP]** Design customer journeys based on business objectives
- ✓ **[CRM]** Analyse current status, needs & design automation processes

- ✓ System & touchpoints integration
- ✓ Transform & integrate in-out data
- ✓ Custom development based on unique needs
- ✓ Test, accept & deploy production
- ✓ Transfer & Hypercare

- ✓ Activate platform license after go-live
- ✓ **[CDP]** Directly setup & monitor customer journeys + Design content + Performance reports
- ✓ **[CRM]** Develop roll-out plan, train & directly drive business units' daily operations

* **Managed Service** should be **highly beneficial** for Businesses that:

⚠ Lack a dedicated and skilled team to leverage the solution effectively

⚠ Or simply wish to utilize Mobio's expert experience, skills, and insights to establish best practices in the initial phase before transferring to your in-house team

Exclusive option for Enterprise Plus: Self-hosted Deployment



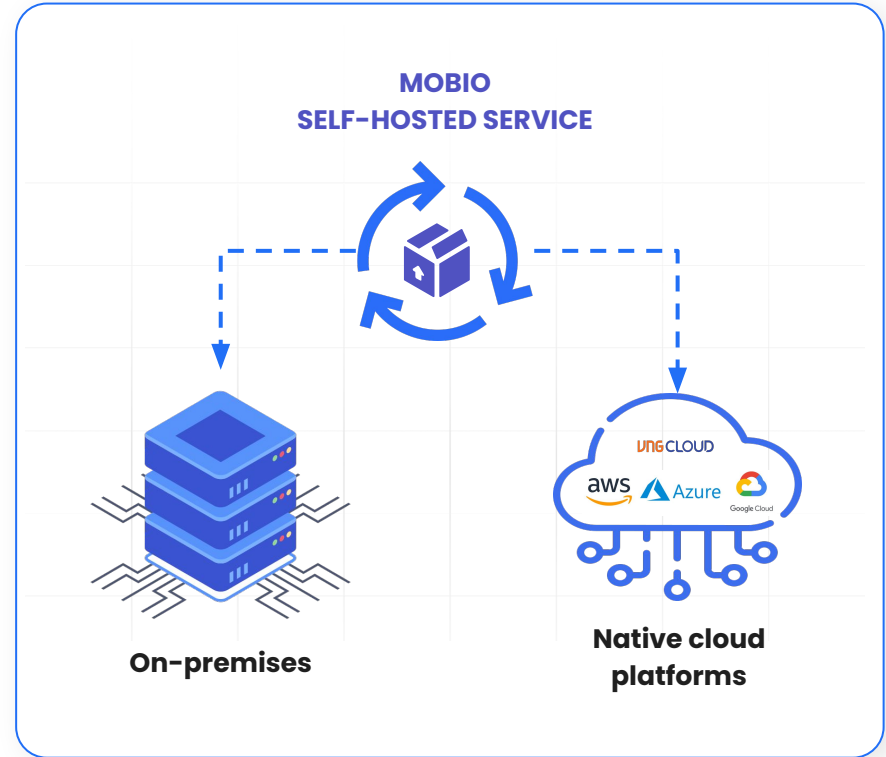
Gain complete control over your platform and data, ensuring compliance with all stringent industry regulations and organizational security standards



Expert consultation on architecture and deployment strategies tailored to your existing IT landscape



Seamless coordination with your technical operations center to guarantee solution stability and performance



** Successfully deployed self-hosted services for **10+ BFSI and Enterprise clients***

The Power of a Unified Ecosystem

- Mobio's Solution
- Integrated Solution Partner

We **orchestrate** our ecosystem to deliver a **seamless, unified solution** for BFSI & Enterprises. This **removes the burden of complex architectural evaluation** and significantly **lowers the total cost of integration**.

Presales

Sales

After-sales

Solution for Banking & Finance

Front-line Operations

Back-office Operation

- Activation CDP (Marketing)

- Growth Managed Service

- Smart CRM for Sales
- Sales & Agent Super App
- Workflow Automation

- **LOS, AI-decisioning**
- **Micro-finance**

- Smart CRM for Service (omni-channel service hub)
- Loyalty Marketing

- **LMS**
- **Call Center & AI Call-bot**

Solution for Insurance

Front-line Operations

Back-office Operation

- Activation CDP (Marketing)

- Growth Managed Service

- Smart CRM for Sales
- Sales & Agent Super App
- Workflow Automation

- **Insurance CRM**

- Smart CRM for Service (omni-channel service hub)

- **Claim Management Managed Service & Automation**
- **Call Center & AI Call-bot**

05.

Why Mobio?

Why choose Mobio as Your Strategic Partner?

Proven Success Stories

We are proud to be the pioneering vendor in Vietnam with hands-on experience and successful implementation in all of our CDP, CRM and related delivery projects



Customizable, Reliable & Scalable system

We understand our customer's unique needs, which is why we designed our solution to be highly customizable, configurable and super easy to integrate with other systems



MOBIO
CDP & CRM Platform

Optimal Investment

We tailored our products and services to your actual needs. As a result, we are able to offer pay-as-you-go pricing plan while ensuring quality and capability to grow with your business in the long run



ROI-Oriented

We don't just deliver a platform; we deliver measurable business outcomes. We commit to accompany you with local support and proven expertise.



Local Expertise, Global Standards: The Smart Choice for BFSIs & Enterprises

	Mobio Integrated Solution	Global Solution Providers	In-house Development
Vertical & Local Expertise	Deep local knowledge and strong vertical expertise, especially for BFSI and Enterprise.	Captures global trends, but fails to grasp the specific characteristics of emerging markets like Vietnam & SEA	Deep understanding of internal operations but lacks an industry-wide perspective and market trends.
Deployment Options	✓ SaaS (Mobio cloud) ✓ Self-hosted	SaaS (vendor's cloud)	Self-hosted
Time-to-market	3-6 months	12-18 months	18-36 months
Renovation & Maintenance	Product is renovated, enhanced, and features are added monthly.	Product is renovated, enhanced, and features are added regularly	Post-go-live, focus is primarily on maintenance.
Local support	Dedicated local Customer Success, Technical, and Product teams are actively engaged throughout the journey	Limited local support due to reliance on a local middleman and slow response from foreign experts. Extended SLA.	Direct support transfers from development team to the Application Management team
Adaptability	No-code/low-code and highly customizable architecture, ready for adaptation and changes with shifting business needs	High customization cost and extended timelines for changes, reliant on offshore expertise	Rigid structure based on initial requirements; adapting to business changes requires a new project initiation.
Return on investment (ROI)	Optimal TCO and rapid time-to-value. Our all-in-one platform eliminates integration complexity and fragmented licensing.	Premium cost, multi-licensing and vast scope lead to underutilization, making clear ROI justification challenging	No information

Let's build your own Data-Driven Future!

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MOBIO