What you can do with Sansan

An introduction to Sansan:
Transform business card contacts into corporate assets

Contents

What is Sansan

What is a Business Card

What is the value of a business card in the first place?
We believe that a business card contains three pieces of information.

1 ☐ Customer Information

The business card is an accurate and reliable record of the latest information, including the contact's name, title and company name.

Sansan 株式会社
営業マネージャー
山田 太郎

2 ☐ Contact Information (Connections)

The business card serves as a "proof of acquaintance." It reveals the lines of connections and contains information at the individual level that is useful to the business.
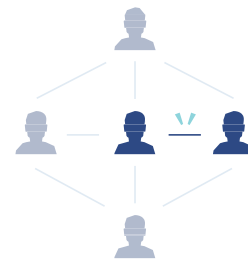
3 ☐ Strength of the business card holder

The depth of a person's connections is a representation of that person's strength. The amplitude of the person's horizontal ties suggests the business card holder's area of expertise.
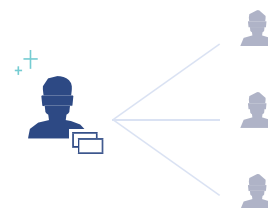
The business card is not simply a piece of paper.

It is an asset that will boost the growth of your company in the future.

Three Values That Sansan Offers

Value 1

Expand sales opportunities

The cross-department sharing of business cards, which would otherwise be lying in the drawer, turns personal connections into the company's assets and expands sales opportunities.

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5 functions that expand sales opportunities

Business Card Sharing

Visualize company's connections through business cards

The sharing of all the business cards that the company has received so far with the other teams, departments and generations of employees enables anyone to tap on the connections built by all the employees. The introduction to a key person by a coworker with the appropriate connection creates business opportunities and offers an endorsement of the deals.

Organization Tree

Know whom to approach through organization tree

The system automatically generates an organization tree for each company based on the internal business card data and public personnel data. Not only does it show the connection between our company and the other organization at the individual level, as well as when, where and what they did together, but also the depth of the relationship, making it clear whom one should approach.

Bulk Email

Send bulk emails with high response rate

High response rate is a feature of Sansan's email function. Our bulk email function allows you to approach multiple customers as if you are communicating with them on a one-to-one basis. The use of accurately digitized business card data also helps you to avoid typographical errors and overlooking of changes in the position of the recipient in the organization.

Contact

Strengthen your customer relationships

On top of keeping a record of meetings and correspondence with other departments, the system also keeps a summary of data such as forte, personality and preferences at the individual and company level. Even if the associate or person in charge in another department changes, you will still be able to communicate with the customer based on the stored information. This enhances your relationship with the customer.

Personnel Changes/News Delivery

Receive latest information about the company or individual

We understand that new information may sometimes yield unexpected insight. Therefore, we have programmed our system to deliver to you, the latest news about the people whom you have traded business cards with. You may also get detailed information of customers and companies through the collaboration with Nikkei WHO's WHO and Nikkei Company Profile. This applies not only to the business cards that you have personally received, but also to all the business cards collected by the company.

Three Values That Sansan Offers

Value **2**

Raise employee productivity

Accurately manage business cards, the most valuable source of customer data, without hassle. Sansan will allow you to improve your efficiency and focus on the business that you should be engaging in.

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6 functions that raise employee productivity

Business Card Digitization

Build accurate customer database from business card data

It is very time consuming to build and clean up a customer database. When you use Sansan, getting the most accurate common customer database for the entire company is possible simply by scanning the business cards. The database constantly updated with publicly available information on personnel changes, business cards received by other departments and the latest profiles on Eight, a business SNS (Social Networking Service).

Smartphone App

Instant access to business cards any time

With the smartphone app, you can easily access all the business cards owned by all the employees at any place, any time. You can run searches using various keys, such as the company name, customer name, phone number and email address. There is no need to trouble your coworkers anymore.

Customer Management

Simple customer management with business cards

Such efficiency can only be achieved because this is an application that focuses primarily on business card management. This makes customer management straightforward and easy for anyone, significantly reducing the time spent on it.

Tag

Group the business cards any way you want

The business cards can be easily grouped by adding keyword descriptions called "tags." You can assign multiple attributes to each business card, such as "met at exhibition," "mailing list subscriber," and "met at study group."

List Download

Export accurate business card data to CSV file

You can export all the business card data in the company to CSV file. The file may be used in many ways. Examples include importing the file into the New Year greeting card software or for mail merge when sending DM.

Contact

Easily store and share meeting information

You can store information on valuable meetings with your customers with minimal effort. You can register the information any place, any time, and also adjust the settings to automatically share them with your team members.

Three Values That Sansan Offers

Improve communication in the organization

Collective sharing of all the personnel information collected by the employees in the company will give rise to a more advanced form of communication and change the way in which the organization operates.

--- **2 functions that improve communication in the organization** ---

Profile

**See your coworkers'
connections and strengths**

The skills, knowhow, experience and so on based on business cards received or personal resume will be made visible, and these can be set as a profile. Knowing where your coworkers' strengths in business lies enables you to know whom to ask for assistance when necessary.

Messaging

**Collaboration centered
on business cards**

You can send a message to your coworker with the business card attached at the moment you find an unexpected point of contact. You will be able to find out which coworker has been in contact with this person and the conversations they had by looking at the business card. The benefits are not limited to digitizing and sharing the business cards but extend to accelerating internal collaborations centered on the business cards.

The Most Popular Business Card Management Service

Sansan – pioneer in business card management service for companies – has taken the No. 1 spot in market share for four consecutive years.*
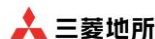We have helped many companies to solve their problems with our business card management service, which transforms business card contacts into corporate assets.

Others
13.2%

Competitor A
5.8%
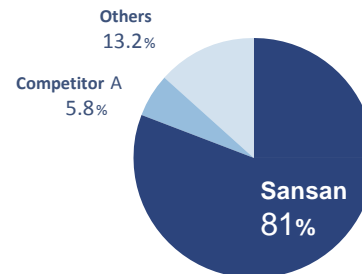
Sansan
81%

More than 6,000 companies of varying sizes from varying industries have adopted Sansan

経済産業省　MITSUI&CO.　Marubeni　ITOCHU　三井不動産　SMBC 三井住友銀行

SAISON CARD INTERNATIONAL / UC Credit Saison Co., Ltd.　LIVABLE 東急リバブル　大和小田急建設 Daiwa House Group　TOKYO GAS エネルギー・フロンティア　SEVEN&i HOLDINGS　FUJIFILM

TOYOTA　Panasonic　三菱地所　UCHIDA　KONICA MINOLTA

dentsu　en　intel Security　PASONA　SBI Marketing　SAP

NTT　NOMURA　CyberAgent　朝日新聞　近畿大学 KINDAI UNIVERSITY
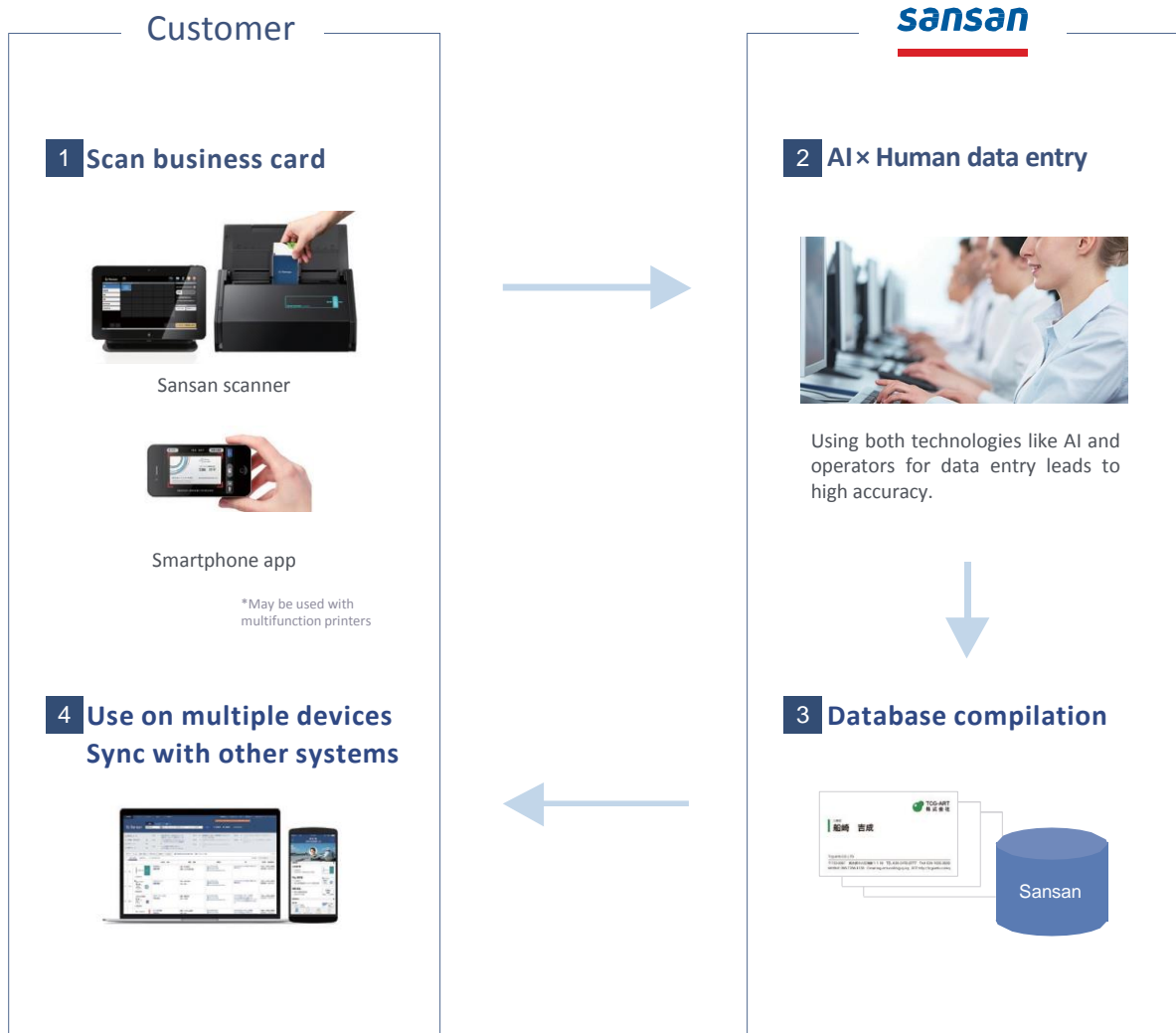
Privacy Mark certification

PrivacyMark System is a system set up in Japan to assess private enterprises that take appropriate measures to protect personal information. Such private enterprises are granted the right to display "PrivacyMark" in the course of their business activities.
Sansan was awarded the Privacy Mark certification in October 2007.

たいせつにします プライバシー
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*2015 Business Card Management Service Provider Share 81%
Source: Seed Planning Research Report in September 2016

How Sansan Works

Build an accurate business card database simply by scanning the business cards using the custom-built terminals. We have operators who manually transcribe the data to achieve almost 100% accuracy.
The system supports six languages – Japanese, English, Chinese, Korean, German and French.

Customer

1 Scan business card

Sansan scanner

Smartphone app

*May be used with multifunction printers

4 Use on multiple devices
Sync with other systems

sansan

2 AI× Human data entry

Using both technologies like AI and operators for data entry leads to high accuracy.

3 Database compilation

Sansan

**Easily build an accurate database
just by scanning the business cards.**

Sansan's Functions

List of Functions

Business Card Management	Business Card Album	It manages the business cards that you have received.
	Contact Details	You can view the contact's data.
	Business Card Search	You can search the business card data.
	News Delivery	We will notify you of company news and personnel changes based on the business card data.
Customer Management	Company Master Data	You can view the information that has been compiled for each company.
	Organization Tree	You can check the organization chart that has been generated based on the business card data.
	Tag	This function enables you to group the business cards. You can search tags or create mailing lists with tags.
Case Management	Case Management	You can link the business card information and record of meetings (contacts) to gain visibility of general sales activities and manage them.
	Contact	It can save your daily report (contact).
Marketing	Bulk Email	You can send bulk email. It is possible to insert data from the business cards into the content to personalize the emails.
Information Sharing	Messaging	You can exchange messages with your coworkers on Sansan.
	Salesforce Integration	The business card data uploaded to Sansan will be forwarded to "Leads," "Accounts" and "Contacts" in Salesforce.
	Integration With Other Services	You can utilize the data by integrating with other systems using APIs.
Support for Mobile Devices	Smartphone App	You can use the smartphone app to upload the business cards and search for business card data.
Support for Uploading Business Cards	Sansan Scanner	This is a custom-built application developed by Sansan to increase the efficiency of uploading the business cards.
Operation	Operation/Management Function	You can manage the system to control access to functions and viewable data and restrict IP addresses, etc., in order to ensure secure usage.

Business Card Album

You get an immaculate business card album simply by scanning the business cards.
The system supports various mobile devices such as smartphones and tablets.
Based on the business card data, the system will deliver information on personnel changes, news and other information that will be useful to your sales activities.

■ Home

States the name of the business card holder and the date that the card was received.

Facilitates immediate communication

View current and past business card images.

Click!

With **multi-device support**,

you can switch among devices when you are at meetings or on-the-go.

PC

Tablet

Smartphone

POINT

✓ Effortlessly store connections within your organization

It's impossible to store your professional networking contacts with a system if no one can use it. But Sansan's intuitive design, which is convenient even for a layperson, makes it possible to add your connections into your organization.

✓ View the location stated in the business card on the map with just one click

Display the business location stated in the business card on GoogleMap with just one click.

✓ Automatic population of email address

Clicking on the email address displayed in the list will launch an email window with the company name, department, title and addressee populated. All you have to do is to fill in the content and the email is ready to be sent.

✓ Easily view current and past business card images

Click on the business card image and scroll to see past business card images.

Contact Details

—

Another feature of Sansan is the ability to manage business card information at the individual level. Not only will you be able to store the business card information but also information about that person as the company's asset.

■ Contact Details

This section is a compilation of all the information on the contact that has been recorded by the company so far, including the person who received the business card and the record of interactions.

Accurately digitized.

You can view the history of business cards received from this contact.

You can also add details and memos on the contact's hobbies and preferences, etc.

POINT

☑ **Only Sansan can automatically collect customer data and group it by person**

If you manage data by business card basis, the customer data may be dispersed. It is also time consuming to collate the names and confirm the latest information when you want to create mailing lists for sending out mails and season's greetings. You will be able to centralize the data and improve efficiency if you manage the data by person. After all, multiple coworkers could have met the same business card contact.
A centralized management of the data on the same contact held different coworkers will create a more detailed profile of that person.

Sansan, based on the model of focusing on the contact

Centralized customer data

Other services, based on the model of focusing on the business card

Dispersed customer data

Business Card Search

In addition to company name and contact name, you can run a search using other parameters such as phone number and email address. Not only are you able to search the business cards that you own, but also connections held by those in your company, including your coworkers and bosses.

■ Home (Advanced Search)

Refine search

You can run a search against the business card data using the company name, contact name and email address. For example, you can narrow down the search results to those with the title, "Director," by using the field "Title."

It is also possible to search by the date the business card was received, memos added after the business card was uploaded and the tags assigned to the business card. You can specify the search to cover only the business cards that you own or the business cards available across the company. You can use the AND and OR search commands to efficiently search the business cards.

POINT

⊘ **Convenient search function**

You can save your search criteria.

⊘ **Tag search enabled**

You can also run a search based on the assigned tags. Please refer to page 18 for more details on tags.

News Delivery

The system automatically collects various information that are useful to your sales activities based on the business card data.
You can confirm and gather information prior to meetings and use any changes in personnel as an opportunity to approach the other party.

■ Home (Latest News)

Latest company news

The system will automatically acquire the latest company news from various news websites.
You can also set the system to notify you of the news by email.
*The news function is currently only available for Japanese companies.

Notification on common connections within the company

Get notified when a member of your company exchanges business cards with a person or company that you know.

Information on personnel changes

You will be notified of the latest business card received by a member of your company and updates in Nikkei Telecom, Diamond and Eight.
* Eight is currently only available in certain countries.

■ Information Update

You will be able to see the updated information by clicking on the personnel changes announcement link.

Company Master Data

—

You can view the contact company's basic data and financial statements under the company master data. On top of consolidating company data based on the uploaded business card, the system also allows you to automatically obtain company information from multiple sources in "Nikkei Telecom."
*This functions is currently only available for companies located in Japan.

- Company Master Data

Click!

Nikkei Telecom

You can view the contact's details in Nikkei WHO'S WHO database.

--- POINT ---

☑ **Collective management of company data**

The system consolidates all the data linked to the company, including the contacts and cases.

Organization Tree

The system automatically generates an organization tree for each company when a business card is uploaded. Furthermore, in addition to the data gleaned from the physical exchange of business cards, people with Nikkei Company Profiles as well as people you have not yet been in contact with can automatically appear in the organization tree. You can combine this function with newly visible connections held by your company and use them to your strategic advantage in the business world.
*The Nikkei Company Profiles are currently only available for companies located in Japan.

■ Organization Tree

POINT

✓ Visualization of in-house connections

The ability to check the company's connections with the target company allows for cross-selling and creation of opportunities for approaching the top management.

✓ Visualization of people you have not yet been in contact with

The organization tree reflects information of key persons that you have not yet been in contact with, thereby allowing you to draw up a strategy to efficiently approach the company.

Tag

You can easily group the business card data. The groups are searchable and can be used as mailing lists. This makes the business card search more efficient it possible to efficiently search for business cards and enables you to send messages effectively to the target group.

■ Home

You can tag multiple cards simultaneously.

You can download the business card list sorted by tags as a CSV file.

*Download permissions can be configured.

Tag

You can create nested tags. Furthermore, you can make the tags public or private, so you can use them to manage your personal lists too.

POINT

☑ **Ability to group freely**

You can assign multiple tags to each business card.

☑ **My tag and shared tag**

You can set the tag as "My tag" that is only visible to you or as "Shared tag" that is visible to other members, depending on the purpose.

☑ **Easily applied to lists**

You can generate a sales list or mailing list based on the tags assigned to the business cards.

Opportunity Management

Sansan's sales management feature lies in opportunity management.

By syncing the sales information and Contact (record of meetings), the system goes beyond simple opportunity management to become the foundation for supporting sales activities on the whole. The sales associate is able to check the opportunity status in chronological order and the sales manager is able to check the progress of each opportunity in a list, making this a user friendly system for sales on the whole.

Furthermore, matters linked to the business cards, such as who had been undertaking sales activities with which customers, will be easily stored within the organization in a clear manner.

■ Case Management

The progress and status are shown in a graph. It allows the user to quickly compare and grasp the trends, which would have been difficult to glean from figures alone.

You can manage the actual and expected results in real time.

Click!

■ Case Details

The items can be customized for each template.

The business cards of relevant parties are shown here.

Contacts tied to the business card are also automatically linked to provide a summary of the sales activities.

Contact

The contact history (face-to-face meetings, emails, phone calls, etc.) between you and the person you have exchanged business cards with will be linked to that contact's business card so that it can be managed. By having your own meeting memos stored, it will naturally become an asset of the organization.
This record of contact can be easily found by using the sort or search function.

■ Details of Contact (Input)

There is no need to enter the customer information as it is possible to specify multiple business contacts and participants simply by selecting the business card.

You may attach the documents used during the meeting or the documents sent via email for record.

■ Details of contact (Registered contents)

Email notification

You can adjust the settings to follow a user and have the details of contact registered by that user delivered to your mailbox in the form of a report the following morning. This saves the hassle of putting together daily reports and enables advice to be given on the meetings.

Set reminders

You can set email reminders to prompt you on the next action. You can enter the details of the follow up action and have it delivered to your mailbox to avoid missing out on important opportunities.

POINT

⊘ **Use as daily/activity report**

It is efficient because information can be easily added and it can be used as a daily/activity report and easily referenced at a later date.

Bulk Email

With our bulk email function, you are not limited to just sending email newsletters. Our system also allows you to send emails with the business card holder as the sender to make the email look personalized.

■ Bulk Email

Significantly higher response rate can be expected by specifying the business card holder as the sender to make the email look like a personal correspondence.

You can also attach files.

You can also send the email in HTML format by selecting "HTML Email" under "Email Format." You can type the HTML code directly into the body of the email or paste the code.

■ Create Mail

Tracking

You may use this in conjunction with external website access analysis tools to check if the recipient has clicked on the URL in the email.

POINT

⊘ Enhanced email delivery functions

You can send attachments and emails in HTML format. Furthermore, there are necessary email delivery functions in place, such as management of undelivered mails and email exclusion filters.

⊘ Send up to 100,000 emails a day

There is no interference to our customer approach and you can send as many emails as you want, whenever you want.

⊘ No need for list preparation

The tags perform as the mailing list so there is no need to prepare the data again. The ease of sending bulk emails is made possible by the accurate business card data and data management by the person, which prevents duplications.

Messaging

This is a function that allows you to exchange messages with your coworkers on Sansan.

■ Messaging

You can send messages to your coworkers. You can also reply to any messages on the spot.

By quoting the relevant business card, you can also check the exchange of messages from the contact's page too.

■ Contact (Messaging)

POINT

☑ Exchange messages on Sansan

This function allows for smooth communication when you want your coworker to introduce a contact to you.

Salesforce Integration

—

This is a function that forwards business card data uploaded to Sansan to "Leads," "Accounts" and "Contacts" in Salesforce. You can select between two methods of transfer under Admin Settings: (1) "Automatic forwarding" whereby data is transferred at the time the business card is imported or scanned using Sansan scanner; or (2) "Manual forwarding" whereby the user selects the business cards to be forwarded after they have been digitized and registered in Sansan.

Automatic forwarding

When you scan or import a business card to Sansan, the business card data will be automatically forwarded to Salesforce. Every time the data in Sansan is updated, the relevant item in Salesforce will automatically be overwritten with the updated data.

Manual forwarding

After a business card registered in Sansan has been digitized, you will be able to select the business card for forwarding to Salesforce. Manual forwarding is the most suitable option when you want to forward only specific business cards to Salesforce.

Forwarding settings

The forwarding option can be set under Admin Settings.
In forwarding settings, you can also select from "Accounts as well as Contacts" or "Leads (Sales Cloud only)."

Integration With Other Services

—

You can make full use of the data by by integrating with other services such as Zapier and Salesforce.

salesforce   B2B LoveLetter®   ProgOffice Enterprise

ZOHO CRM   kintone on cybozu.com   eセールスマネージャー Remix CLOUD

Phone Appli   B⇒Dash   おもてなし電話   bodais

zapier   Microsoft Dynamics CRM   moconavi

Note: Only a sample of services are shown above.

Automatic integration with other systems through API

Utilizing APIs to sync with your core system or other customer management systems ensures that customer data is consistent and information is accurately consolidated.

CSV download to increase breadth of data usage

The CSV download function has also been added to allow the data to be used in various other applications as well.

Automatically stores online inquiries

Inquiries sent via the online form will be automatically registered as business card data.

*This is possible if you install the function in the online form program.

Smartphone App

All you have to do is to scan the business card and the business card data will be digitized for your use.
This app has been designed with the ease of use on smartphones in mind. It supports both iOS and Android.

Accurate digitization

All you have to do is to take a photograph of the business card with our custom-built app and the data will be accurately digitized. The image that you have taken will not be stored in the app.

Search for information quickly

You will be able to quickly access information that you want, such as phone number, email address or location on the map.

Add a memo easily

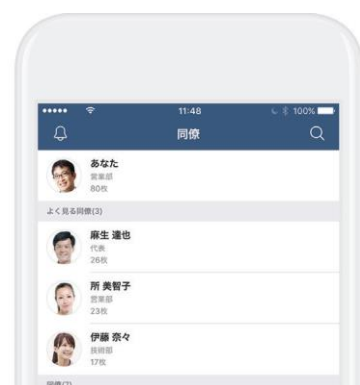You can easily store detailed information such as the customer's preferences.

Naturally share connections internally

The visibility of the relationships between the internal members and the external parties are to be useful in sales activities.

Commitment to security

You can restrict access to IP addresses via VPN or MDM to increase security.
You can also limit the smartphone usage.

Sansan Scanner

This is a custom-built application developed by Sansan to increase the efficiency of uploading business cards.

Scan business card

All you have to do is to scan the business card. There is no need for manual entry or image editing on your part.

Search for name

You can search for your name.

Specify date that business card was received

You can specify the date that the business card was received. You can also set the handwritten date on the business card as the date the card was received.

Select department and name

You can easily upload the business card by selecting your name and scanning the card.

Easy upload with Sansan scanner!

Sansan — **3** STEPS **only**

1 Obtain business card → 2 Select your name → 3 Scan

Save 1min 45s

Scanning time **15** seconds each time

Other business card management services — **6** STEPS **in total**

1 Obtain business card → 2 Connect to scanner → 3 Launch application → 4 Enter ID/Password (Login) → 5 Select your name → 6 Scan

Scanning time **2** minutes each time
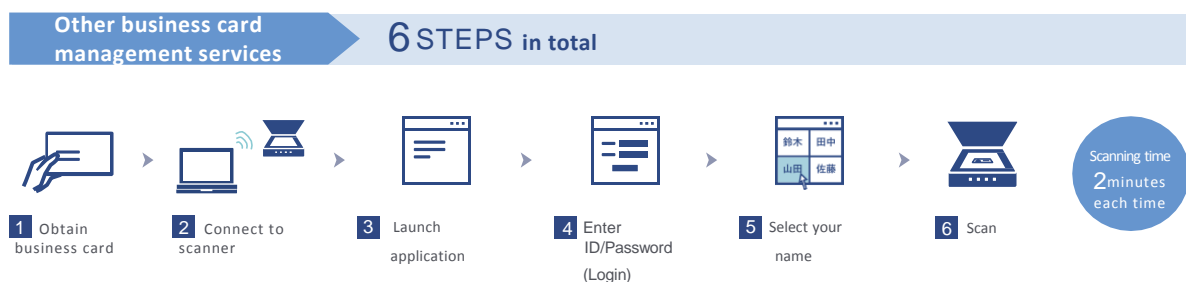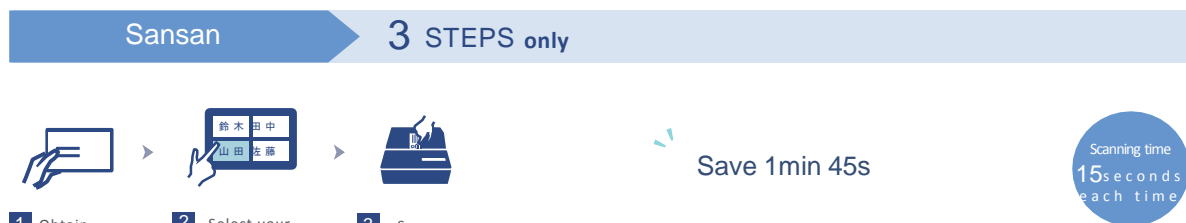
Operation/Management Function

You can customize various settings to operate the system smoothly.
You need to apply for security options to use these functions.

You can set the access authorization by the function.

You can set the business card data download authorization by the user.

You can flexibly customize the level of access to information by the department or by the item.

You can customize the settings to allow only registered IP addresses to connect to the system.

Sansan

Registered IP address   Non-registered IP address
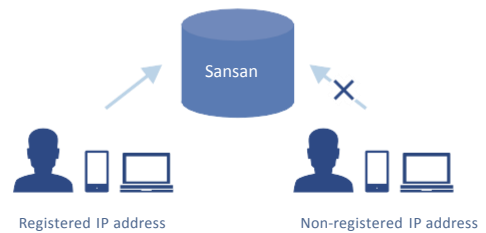
You can integrate Sansan with AD for centralized management of IDs and passwords.

Sansan   Other services

1 ID/Password
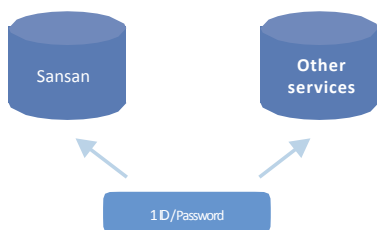
You can do bulk import of user data.
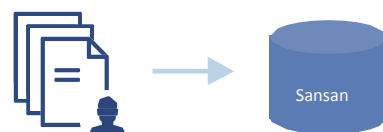
Sansan

Sansan's Security

Sansan's Security

■ **Operation monitoring/management system**

User	Data Center

Data transmission

HTTPS

FW

Receiving server

Wire lock

Network security analysis is carried out regularly

Internet

Database

Standby

HTTPS

FW

Use from PC or mobile devices

Application server

Network security analysis is carried out regularly

Standby

⚠ Limitation of IP addresses and vulnerability analysis are carried out
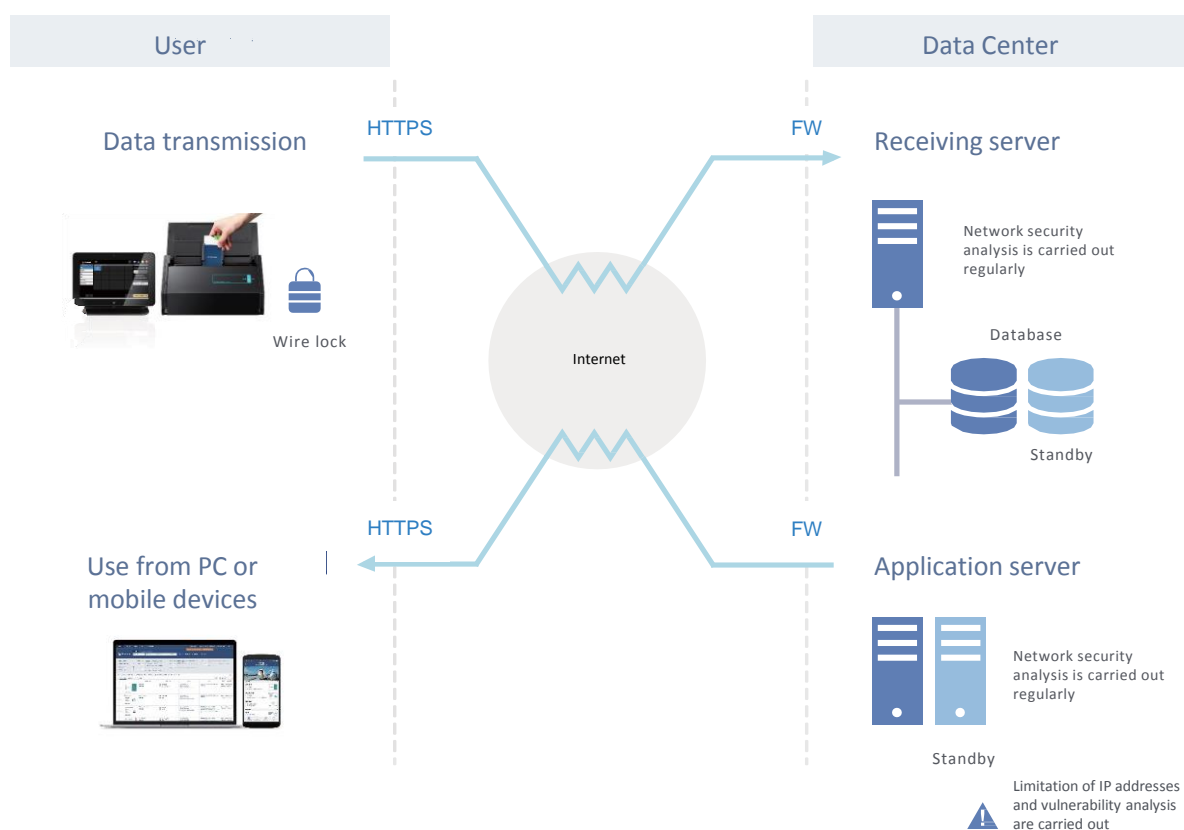
Regular network security analysis

Network security analysis is carried out regularly for the receiving server and the application server.

Limitation of IP addresses and regular vulnerability analysis for the servers

Limitation of IP addresses and regular vulnerability analysis are implemented for the database and application servers.

Privacy Mark certification

Sansan, Inc. has been developing the Personal Information Protection Management System (PMS) since its foundation and we make every effort to ensure security.

Sansan was awarded the Privacy Mark certification in October 2007.

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Comparison With Other Service Providers

Comparison Chart

The difference between Sansan and manual filing, business card management software, customer management tool (CRM), sales force automation (SFA), smartphone apps or the number of other business card and customer management service providers is that our service allows you to share precise business card data across the entire company, making it the only service that lets you to build up your customer contact database in no time.

		Effort to operate		Contribution to sales			Cost to operate	
		Ease of data input	Accuracy of digitization	Sharing of connections	Opportunities/Case management	Bulk email	Maintenance	Support
Sansan	Business card management transforming business cards into corporate assets	○	○	○	○	○	○	○
Business card management software	Ease of embarking on digital management of business cards	△	△	△	×	△	△	△
SFA	The standard for sales management	△	△	○	○	○	△	△
App for individuals	Ability to check business card data on the go	○	○	×	×	×	△	×
Filing/Business card box	Basic method of business card management which everyone goes through	×	×	×	×	×	×	×
Eight	Free and accurate digitization service	○	○	×	×	×	○	×
CRM	Need to maintain data accuracy	△	△	○	×	△	△	△
Data management in Excel	Convenient but requires maintenance	△	×	△	△	×	×	×

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