

Specification of Competency Standards
for the Banking Industry
Unit of Competency

Functional Area - 9. Sales and Relationship Management
(Key Function – 9.4 Account Management and Customer Relationship Management)

Title	Generate data or report for designing customer relationship management activities
Code	109519L3
Range	Generating data or report by using different CRM systems. This applies to different kinds of CRM initiatives of individual branch or sales team.
Level	3
Credit	3 (For Reference Only)
Competency	<p>Performance Requirements</p> <p>1. Knowledge in the Subject Area</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Understand the operating procedures of the CRM systems in order to carry out the job of locating and retrieving data independently; • Understand the objectives of CRM activities in order to interpret request from different parties accurately. <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Trace and retrieve information from the CRM systems according to the requests of different parties; • Ensure the presentation of data or reports is in an appropriate format as requested by relevant parties; • Fine tune a CRMS for better prospecting / managing customer relationship; • Generate data or report from CRM systems in order to obtain information for designing CRM activities. <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Show concerns about quality of outcomes on data or report generation; • Have a desire on accuracy, timeliness and reliability of the data or report generated.
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Generation of data or report related to different CRM initiatives from the CRM systems. The report contains useful information as required in different initiatives and is presented in a format which is easy to read and interpret.
Remark	