

Client Management, Advisory and Support > Account Management and Servicing

Title	Generate data or report by using Customer Relationship Management (CRM) systems
Code	106862L3
Range	Generate data or report by using different CRM systems. This applies to different kinds of CRM initiatives required by individual sales team / staff.
Level	3
Credit	3 (for reference only)
Competency	<p>Performance Requirements</p> <p>1. Acquire knowledge related to CRM systems and initiatives</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Understand the operating procedures of the CRM systems in order to carry out the job of locating and retrieving data independently</li> <li>• Understand the objectives of CRM activities in order to interpret request from different parties accurately</li> </ul> <p>2. Locate required information in CRM systems</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Retrieve information from the CRM systems to according to the request of different parties</li> <li>• Ensure the presentation of data or reports is in an appropriate format as requested by different parties</li> <li>• Fine-tune a CRMS for better prospecting / managing customer relationship</li> <li>• Generate data or report from CRM systems in order to obtain information for designing CRM activities</li> </ul>
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> <li>• 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.</li> </ul>
Remark	