

Hong Kong Qualifications Framework

Specification of Competency Standards (SCS) for the Retail Industry in Hong Kong (Version 2.0)

29 September 2023

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Preface

The Executive Council endorsed the establishment of a Qualifications Framework (QF) and its associated quality assurance mechanism in February 2004. The primary objective of establishing the QF is to provide a platform to encourage and facilitate lifelong learning, with a view to enhancing the capability and competitiveness of the workforce in Hong Kong. The objectives are to be achieved through:

- Defining clear and objective standards applicable to qualifications in the academic, vocational and professional as well as continuing education sectors;
- Assuring the quality of qualifications and the associated learning programmes available to learners; and
- Assuring relevancy of learning to industry needs.

Background of the Retail SCS 2.0

The Retail Industry Training Advisory Committee (ITAC) formulated the Specification of Competency Standards (SCS) for the industry and electronic-business in 2014 and 2017 respectively. In view of the ongoing development and transformation of the retail industry, the ITAC approved to update two sets of SCS mentioned above in October 2020, with an aim of meeting the changing market needs and the actual industry development. The most obvious aspects are the combination of traditional retail and e-business, the application of information technology and the popularity of electronic payment.

LRT Consulting was appointed the Professional Writer of this project in late 2021. The major tasks included reviewing the development trends of the industry and the changes in each core functional area, and analysing the duties in the newly added or changed core functional areas, so as to provide the industry with a roadmap for career and learning progression, and to enrich the existing competency units to meet the actual requirements of major jobs.

Major Changes in the Retail SCS 2.0

In response to the consumer experience and new business model in which retailers use both online and offline channels, the Professional Writer integrated the core functional areas of the two previous sets of SCS as follows:

Specification of Competency Standards	Specification of Competency Standards for Retail Industry Electronic-Business	Specification of Competency Standards (Version 2.0)
Merchandising and Supply Chain Management	Planning and Operation (Operating data analysis Website content planning and maintenance Purchasing and logistics management Customer services)	Strategic and ESG Management
Human Resource Management & Development	Internet Marketing (Operation planning and marketing strategy Multi-channel promotion of communication Customer relationship management Website data analysis)	Sales, Marketing and Multi-Channel Sales Management
Strategic Management	Corporate Management (Human resources management Financial management Customer relationship management Purchasing and logistics management Marketing management)	Customer Relationship Management
Sales and Marketing	System Development and Maintenance (Website design and development Website monitoring and testing technology Transaction security technology Hardware architecture and maintenance)	Merchandising / E-commerce Merchandising
Customer Services		Supply Chain Management
Information Technology		Customer Services
Store Operations		Store Operations
Specific Product Knowledge		Human Resource Management & Development
		Data Analytics
		Information Technology
		Specific Product Knowledge

At the same time, the Professional Writer updated more than 200 units of competency (UoCs) and appended 10 new UoCs to address the new competency requirements. Under QF, in addition to the roadmap for progression in learning and employment, an overview of the scope of work and core competencies was also provided for 49 key job positions.

For the convenience of organisations that are using existing competency units, a “Cross Reference Table for Different Versions of Retail SCS” is attached to this Report.

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Apart from the one-on-one interviews, the following TV programmes, webinars, etc. were also taken as references.

- 《商. 對論》第 12 集—O2O 電商公司創辦人陳嘉賢、家庭電器品牌創辦人兼董事長陳國民，無線財經資訊台 2017 年 1 月 23 日。
- 《商. 對論》第 14 集—立邦漆（香港）總經理周嵐，無線財經資訊台，2017 年 2 月 6 日。
- 《商. 對論》第 26 集—Carousell 旋轉拍賣國際副總裁蔡家驥，無線財經資訊台，2017 年 5 月 1 日。
- 《商. 對論》第 30 集—海馬牌床褥創辦人鄔友正，無線財經資訊台，2017 年 5 月 30 日。
- 《商. 對論》第 31 集—太子珠寶鐘錶集團主席及行政總裁鄧鉅明，無線財經資訊台，2017 年 6 月 6 日。
- 《商. 對論》第 42 集—adidas 大中華區銷售渠道管理高級副總裁蕭家樂，無線財經資訊台，2017 年 8 月 24 日。
- 《商. 對論》第 43 集—LALAMOVE 共同創始人及總監譚穩寶，無線財經資訊台，2017 年 8 月 31 日。
- 《商. 對論》第 51 集—周大福珠寶集團董事總經理黃紹基，無線財經資訊台，2017 年 10 月 26 日。
- 《商. 對論》第 78 集—香港電視網絡有限公司主席王維基，無線財經資訊台，2018 年 10 月 18 日。
- 《商. 對論》第 94 集—三寶鐘錶珠寶首席執行官李樹忠，無線財經資訊台，2019 年 5 月 2 日。
- ‘Straight Talk: How can Hong Kong’s retail industry find hope heading into the new year?’ by TVB News on 18 January 2022.
- [‘Ray Kurzweil: Get ready for hybrid thinking’](#) by TED in 2014.
- [‘Webinar on Entrepreneurship in post COVID-19 resurgence: Entrepreneurship and Fintech’](#) by UNCTAD on 22 April 2021.

- [‘The Open Data Campaign: Building on a Year of Open Data with Brad Smith and Jennifer Yokoyama’](#) by Microsoft.

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Part I: Environmental Scan Report

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Chapter 1 Industry Background

1.1 Development of Retail Industry Driven by the Individual Visit Scheme (IVS)

Retail is one of the core pillars underpinning Hong Kong's economy. Since the return to Chinese sovereignty, retail has experienced various ups and downs. Hong Kong's economy shrank by the stock market crash caused by the Asian financial turmoil in 1997, the seriously affected export trade after the 9/11 attacks in 2001, and the outbreak of severe acute respiratory syndrome ("SARS") in early 2003. The HKSAR Government put forward a proposal to the Central Government, requesting to allow travellers from the Mainland to visit Hong Kong in a more convenient way. This proposal received a quick response. The Central Government implemented the IVS on 28 July of the same year. It attracted a large number of Mainland visitors to Hong Kong and drove the development of Hong Kong's inbound tourism. In 2009, Hong Kong was negatively impacted by the global financial crisis. The Central Government increased the IVS quota in response to the HKSAR Government's further request. Tourists through the IVS not only visited Hong Kong more frequently, but also had higher spending power. As of 2019, there are over 294.44 million visitor arrivals from the Mainland through the IVS since its implementation.¹

1.2 Retail Facing Up to Unprecedented Challenges

However, the violent protests occurred in 2019 directly affected the operations of enterprises and small shop tenants, especially in retail, catering and tourism industries. The number of Mainland visitors dropped by 14.2% to 43.77 million in 2019, while the number of Mainland visitors who signed up for the IVS also recorded a negative growth, down 19.8% to 25.12 million.² In addition to the 2019 coronavirus disease epidemic (the "epidemic") raging around the world, tourist spending which used to account for about 30% of retail sales³ had almost disappeared, leaving many enterprises and small shop tenants in financial burdens. As of the end of October 2021, even though the HKSAR Government had granted more than

¹ 香港便覽：旅遊業（2020年5月）。

² Hong Kong Tourism Board. *A Statistical Review of Hong Kong Tourism 2019*.

³ KPMG China and the Hong Kong Retail Management Association. (2019) *Minding the Retail Gap: Hong Kong's talent challenges and future strategies*.

HK\$75 billion in loans through the “SME Financing Guarantee Scheme”, that had helped more than 27,000 small and medium enterprises (SMEs) (more than 3,100 of which were retail enterprises, involving HK\$7.8 billion) in capital turnover,⁴ some merchants could not sustain themselves so as to close their businesses. Shop vacancy rate in Hong Kong increased from 10.1% at the end of 2019 to 11.4% at the end of 2020,⁵ which was even worse than the 10.8% during the outbreak of SARS.⁶ Fortunately, amid the full recovery of market conditions, the number of establishments of all types of retail outlets increased from 62,140 in December 2020 to 63,614 in September 2022.⁷

On the other hand, according to the *Standard Chartered Hong Kong SME Leading Business Index Quarter 1, 2022*, the business index of the retail industry continued to rise from 27.9 in Quarter 1 2021 to 46, and recruitment sentiment also increased compared with the same period of last year, showing a stable business confidence among local SMEs.⁸

Even though the fifth wave of the epidemic developed rapidly after the Chinese New Year in 2022 that seriously hit the recovery of the retail industry, employers and employees worked together with perseverance to meet the challenges that follow.

1.3 Getting Back on Track Steadily

According to a recent study, the outlook for Hong Kong’s consumer markets in 2023 is optimistic, with retail sales forecast to increase by 13% to approximately HK\$395 billion. Besides, supported by the recovery in tourism and the strengthening RMB, department stores and the luxury sector will continue to revive by around 40% in 2023.⁹

⁴ 〈陳茂波料來年香港經濟穩步增長〉，政府新聞網，2021年12月9日。

⁵ *Hong Kong Yearbook 2020*, Chapter 3 The Economy.

⁶ The Government of HKSAR. *2003 Economic Background*.

⁷ *Hong Kong Standard Industrial Classification Version 2.0* Table E006: Number of establishments, persons engaged and vacancies (other than those in the civil service) analysed by industry section (September 2022).

⁸ Standard Chartered Hong Kong *SME Leading Business Index* Quarter 1, 2022.

⁹ <https://www.pwchk.com/en/press-room/press-release-chi/pr-090223-chi.html>。

In terms of employment, the import/export, wholesale and retail trades, and accommodation (covering hotels, guesthouses, boarding houses and other establishments providing short-term accommodation) and food services accounted for 25.7% of the total employment in 2021, the proportion was second only to public administration and social and personal services, which accounted for 29.2%.¹⁰ Of the five sub-sectors, retail trade is projected to have an average annual growth in manpower requirements from 2017 to 2027, increasing only 0.3% a year to reach 339,100 workers by 2027.¹¹ This projected growth occurs in the third decade after the return to Chinese sovereignty.

¹⁰ *Hong Kong Yearbook 2021*, Chapter 7 Employment.

¹¹ The Government of the HKSAR. (2019) *Report on Manpower Projection to 2027*.

Chapter 2 Environmental Scan

Before updating the existing Specification of Competency Standards (SCS), it is important to understand the challenges facing the retail industry and explore the future development trends. This chapter therefore uses ‘PESTLE’, a systematic analysis approach, to examine the impact of macro-environmental factors on the retail industry.

In accordance with Wayne F. Cascio (Robert H. Reynolds Chair in Global Leadership at the University of Colorado Denver), the key issues in each of these six macro-environment factors include:

- Political* : regulatory developments, government policies related to issues that affect the industry, taxation schemes, government grants and fiscal incentives, political stability, strikes, the role of governments in different countries, war
- Economic* : interest rates, currency exchange rates, the state of economies, prices, inflation, the distribution of wealth in a society, the effects of globalisation, vertical and horizontal integration in one’s industry, industry trends and changes
- Sociocultural* : demographic changes, lifestyle developments (e.g., the movement toward “wellness” and healthy living), differing wants and needs of generations in the workplace and outside of it, education and expectations of higher education
- Technological* : product technologies (e.g. smartphones, virtual reality, robotics), communication technologies (e.g., the internet, Skype, FaceTime, email, text messages, social media), operational technologies (e.g., global distribution systems, global supply chains, mass customisation)
- Legal* : both statutory as well as developments in case law (e.g., immigration, health care, water, cyber law, privacy, product liability, patent law, intellectual property, civil rights)
- Environmental* : climate change, global sustainability with respect to the use of natural resources (including air, water, and land), mining, hydraulic fracturing, fossil fuels, clean energy, alternative energy sources¹²

With reference to the good practice of environmental scan, in addition to desktop research, the Professional Writer Team leveraged on the well-established network of Hong Kong Retail

¹² Cascio, W. F. (2015) ‘Environmental Scanning: An Emerging Challenge for HR professionals’ in Ulrich D., Schiemann, B. and Sartain, L. (ed.) *The Rise of HRM Wisdom from 73 Thought Leaders*. Alexandria, VA: HRM Certification Institute. P. 35-40.

Management Association and interviewed a host of stakeholders including CEOs, business directors, etc. from retail businesses of all sizes and sectors, to collect their views and insights around the following questions:

The Retail Environment

- How will political, economic, sociocultural, technological, legal and environmental factors affect the future of retail in Hong Kong (in short, medium and long term)?
- How will these influence or changes affect the competency requirements?

Smart or Omni-channel Retailing

- There are trends of combining online and offline in both customer experience and business models. What are the needs, design and planning to traditional and new job roles (management and non-management) for smart or omni-channel retailing?
- For smart or omni-channel retailing, what are the competency requirements for traditional and new job roles (management and non-management), including knowledge, skills, mindset and experience?
- Other views and comments on the factors affecting talent development in Hong Kong retail.

Between the end of 2021 and 30 March 2022, the Professional Writer Team conducted 25 interviews with senior executives in the retail industry. The collected views and comments were analysed and integrated together with the findings from desktop research. The global trend, local development, potential impact on the business environment and implications to the industry of each defined macro-environmental factor were compiled and identified as follows:

2.1 Political Factors

Global politics and geopolitics in recent years are unpredictable and turbulent. Both international relations and local political development are closely associated with economics. For the second time in three years, credit rating agency Moody's downgraded Hong Kong's rating to Aa3 from Aa2 in 2020, saying its view on the strength in Hong Kong's institutions and governance is lower than previously estimated.¹³

¹³ [〈【再降評級】穆迪：港管治能力遜預期 港府：深感失望〉](#), now 新聞, 2020 年 1 月 21 日。

2.1.1 Global Trend

China has attracted much attention around the world by the Belt-Road Initiative (BRI). Although there are different interpretations, in any case, BRI shows China's will to reset the rules of globalisation.¹⁴ When one gradually opens up to emphasise international 'peace, development, cooperation, and win-win outcomes for all',¹⁵ the other runs the opposite way. Recent years, hoisting protectionism on trade barriers is getting worse. For instance, the United States' withdrawal from the Trans-Pacific Partnership (TPP) (now known as the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)) in 2017; Brexit in 2020, etc. hindered cross-border trade and affected capital mobility.

In view of the complex and volatile international business environment, there are many major political changes in the past few years affecting the business sector. First, knowledge application has become the most valuable core asset in the world. Enterprises that acquire high ability to execute on knowledge have greater influence in international relations and global engagement than national governments. Second, the current blending of nonprofits and private sector emerge. New markets and opportunities open up for mission-driven enterprises. In particular to those multinational corporations, responsive manpower support between regions and countries is required. For those that rely heavily on international trades, diversified marketing and strategies are crucial to sustained business results.¹⁶ Glocalisation is a strategy developed under the framework of global market, multinational brands adjust to accommodate consumers in local contexts.¹⁷

2.1.2 Local Development

The National Development and Reform Commission and the governments of Guangdong,

¹⁴ 黃健群 (2018) 〈「一帶一路」與中國大陸區域經濟發展：策略與挑戰〉《展望與探索》月刊第 16 卷第 5 期，第 94 – 110 頁。

¹⁵ [〈習近平：中國夢是和平、發展、合作、共贏的夢〉](#)，中國共產黨新聞網，2014 年 9 月 2 日。

¹⁶ Kahan, S. (2015) 'Twelve Predictions for a New World' in Ulrich D., Schiemann, B. and Sartain, L. (ed.) *The Rise of HRM Wisdom from 73 Thought Leaders*. Alexandria, VA: HRM Certification Institute. P. 41-46.

¹⁷ 《與 CEO 對話》—香港麥當勞行政總裁黎韋詩，香港電台，2020 年 10 月 4 日。

Hong Kong and Macao signed the *Framework Agreement on Deepening Guangdong-Hong Kong-Macao Cooperation in the Development of the Greater Bay Area* in 2017. The objectives are to further deepen cooperation amongst three places, fully leverage the composite advantages, facilitate in-depth integration within the region, and promote coordinated regional economic development, with a view to developing an international first-class bay area ideal for living, working and travelling.¹⁸ Same year, strive to build Hong Kong into a world class smart city, the *Smart City Blueprint for Hong Kong* was firstly introduced. Since the release of the blueprint, several large-scale projects of great benefit for the retail industry have been completed. One of them is the Faster Payment System (FPS) launched by Hong Kong Monetary Authority; which does not only provide instant local fund transfer with safe, accuracy and convenience to consumers and merchants around the clock,¹⁹ but also offers consumers a new choice and experience for making payments in multiple currencies.²⁰

Over the years, Hong Kong people have become highly sensitive to politics. In many cases, issues such as economics, technology, and the environment have been distorted into political issues. The social unrest in 2019 is the most destructive one. Hong Kong is riven by social polarisation, while tourism and retail are devastated. Reflecting the epidemic situations, the number of visitor arrivals dropped by 88% in the first five months of 2020 over a year earlier period. Retail is highly dependent on tourism. Retail sales of luxury goods like jewellery, watches and clocks also fell sharply, with a 67% year-on-year decline in the first five months of 2020.²¹ Some interviewees said that the current social polarisation has made retailers more cautious about releasing information to avoid triggering a public relations crisis that could cause irreparable damage. Management needs to remind employees from time to time not to let personal political stances disrupt the workplace.

¹⁸ <https://www.bayarea.gov.hk>.

¹⁹ <https://www.smartcity.gov.hk>.

²⁰ 《商. 對論》第 83 集—AlipayHK 行政總裁陳婉真，無線財經資訊台，2018 年 11 月 22 日。

²¹ Research Office of Legislative Council Secretariat. *Statistical Highlights on Four pillar industries in Hong Kong*.

2.1.3 Competence Requirements

Under the influence of the above-mentioned political factors, retail professionals in Hong Kong need to enhance competency in various aspects which include:

- Enhance awareness of global and local political development, and its potential impact on business and daily operations
- Analyse risks proactively, prevent and manage risks with target and plans
- Implement agile planning and change management

2.2 Economic Factors

Consumption is a key driving force for economic development. Consumer confidence or consumption patterns are affected by various economic and social factors. The epidemic forced most people around the world to work, study, shop, and entertain at home. This new lifestyle has given birth to a stay-at-home economy.²²

2.2.1 Global Trend

The change in consumer behaviour is the most obvious impact of stay-at-home economy on the retail industry. According to a 2021 global consumer insights survey, 61% of Chinese consumers (Global: 39%) said they used mobile phones to shop weekly or daily in the past year, while 53% of Chinese consumers (Global: 45%) said they would shop in stores. The analysis pointed out that an integrated omni-channel sales model blending of online and offline has emerged in China.²³

Hong Kong is the pioneer city to use digital currency in the world.²⁴ Today, 86% of the central banks in the world are engaged in work related to the development and use of Central Bank Digital Currency (CBDC).²⁵ CBDC is the third version of central bank money other

²² 尼爾森《戰疫人白皮書》2020年3月19日。

²³ 羅兵咸永道《2021年全球消費者洞察調查中國報告 解析線上線下雙結合的新消費模式》。

²⁴ 《商. 對論》第61集—八達通控股有限公司行政總裁張耀堂，無線財經資訊台，2018年4月5日。

²⁵ Bank for International Settlements. [BIS Innovation Hub work on central bank digital currency \(CBDC\)](#).

than cash and reserves. Central banks are considering retail CBDCs for various potential benefits. One of them is to promote diversity through provision of open payment platforms that would foster competition and innovation, which would benefit retail users.

Despite the outbreak of the latest variant of the new coronavirus (Omicron) around the world, this did not seem to affect consumer sentiment. The global consumer confidence index in the first month of 2022 reads at 48.6, exactly as it did in two years ago before the COVID-19. In addition, since December 2021, nine of the 24 countries surveyed have consistently recorded National Index above 50. These nine countries are: China (68.8), Saudi Arabia (64.2), Sweden (61.3), India (60.0), Australia (57.1), the United States (55.7), Germany (53.6), Canada (52.2), and Great Britain (51.5).²⁶

2.2.2 Local Development

The COVID-19 pandemic dealt a heavy blow to global economic activities, Hong Kong economy for 2020 recorded the sharpest annual decline.²⁷ With the aims of helping businesses stay afloat; keeping workers in employment; relieving financial burdens of individuals and businesses; and assisting the economy to recover once the epidemic is contained, the HKSAR Government successively issued five rounds of Anti-epidemic Fund since 2020, including the Distance Business Programme, Employment Support Scheme, etc., equivalent to a total of more than 200 billion Hong Kong dollars.²⁸ In fact, the value of total retail sales for 2021 was provisionally estimated at HK\$353.0 billion, increased by 8.1% in value over 2020. However, tourism remained at a standstill. It was still 27.2% less than 2018. Under the epidemic situation, online sales kept growing. The value of online retail sales was provisionally estimated at \$28.6 billion, increased by 39.0% over 2020.²⁹ According to a global payments report, the outbreak fuelled e-commerce market growth. The most popular online payment method in 2020 was still credit cards (45% of total

²⁶ Ipsos' Global Consumer Confidence Index in January 2022.

²⁷ The Government of the HKSAR. (2021) *2020 Economic Background and 2021 Prospects*.

²⁸ <https://www.coronavirus.gov.hk/chi/anti-epidemic-fund.html>.

²⁹ Census and Statistics Department. *Press Release: Provisional statistics of retail sales for December 2021 and for the whole year of 2021* dated 31 January 2022.

transaction volumes), followed by e-wallets (29%). The report predicts that Hong Kong's e-commerce turnover would climb from US\$21 billion in 2020 to US\$29 billion by 2024.³⁰

Around the world, the epidemic situation in various places was unstable. The tightened epidemic prevention measures in response to the latest wave of epidemics in Hong Kong once again hurt the retail sector. As known, the cost of doing business in Hong Kong is quite high, and rent is the number one challenge for retailers.³¹ Hong Kong has once again been ranked among the top five most expensive cities in the world since 2017.³² In terms of the expatriate cost of living, Hong Kong continues its reign on top of the list.³³ For the local employee cost, the effectiveness of Mandatory Provident Fund has been questioned since its operation in 2000.

According to Milton Friedman, an American economist, *'There is one and only one social responsibility of business – to use its resources and engage in activities designed to increase its profits so long as it stays within the rules of the game, which is to say, engages in open and free competition without deception or fraud.'* As one of the measures of corporate success, enterprises understand the importance of maximising shareholder value. In order to achieve this strategic goal, cost-effectiveness is closely monitored. Having said that, enterprises will still invest in high value-added areas so as to adapt to market changes. A survey revealed that 'Information Technology', 'Research & Development' and 'Product & Marketing Promotion' were the top 3 categories that most Hong Kong SMEs indicated to increase investment in for their 2022 development plans.³⁴ This finding is in line with the views of the senior retail executives who were interviewed. They expressed that they would increase manpower in these three categories in order to build an all-round and omni-channel sales system; with consumers as the core of operation.

³⁰ Worldpay from FIS. (2021) *The Global Payments Report*.

³¹ 'Voice of Retail – Stronger than Ever amid COVID-19 Crisis' in *HKRMA Newsletter Retailers*, Spring & Summer 2020.

³² Sheng, Ellen. 'The Five Most Expensive Cities In The World' in *Forbes* of 24 January 2017.

³³ <https://www.humanresourcesonline.net/hong-kong-ranked-most-expensive-location-in-the-world-for-expats-again>.

³⁴ Standard Chartered Hong Kong *SME Leading Business Index* Quarter 2, 2021.

2.2.3 Competence Requirements

Under the influence of the above-mentioned economic factors, retail professionals in Hong Kong need to enhance competency in various aspects which include:

- Pay close attention to the macro-economic development and the impact of various economic indicators on consumers and enterprises
- Make the best preparations for enterprises based on highly reputable market forecasts
- Make good use of existing available resources, including stores, platforms, manpower, technology, open and free resources that do not involve copyright, etc., to control operating costs

2.3 Sociocultural Factors

Personal lifestyles have undergone great changes under globalisation and urbanisation. Career preferences and shopping patterns of the younger generation are different from those of the previous generation. More and more savvy consumers are emphasising sustainable development, brand value propositions, and even corporate philosophy on the environment, society and governance. Increasingly savvy consumers emphasise sustainable development, brand value propositions, and even corporate philosophy on the environment, society and governance.

2.3.1 Global Trend

For the first time in history, persons aged 65 or above outnumbered children under five years of age in 2018; according to *2019 Revision of World Population Prospects*.³⁵ Since this group of senior citizens pays more attention to education, financial management, health and wellness than their predecessors, they generally have higher educational attainment, greater wealth and longer life expectancy. As such, the baby boomer generation is gradually forming a new customer segment. These affluent and healthy senior citizens are independent and more tech-savvy than expected.³⁶ Noticing the changes in senior citizens' consumption

³⁵ United Nations. *2019 Revision of World Population Prospects*.

³⁶ 'Five Things You Need To Know About Marketing To Baby Boomers' in *Forbes* of 26 September 2017.

characteristics that leads to market expansion, enterprises have been developing products that meet their needs and improving service quality in order to seize the opportunities brought about by an aging society. A global survey shows that more than 70% of silver-haired consumers (baby boomers: 77%; 74 years and above: 73%) express allegiance to brands with clear missions. Although the silver-haired consumer group is slightly less loyal compared to Gen Z (92%) and Millennials (90%),³⁷ they have far greater purchasing power than the younger generations.³⁸

In balancing cost-effectiveness and improving service quality, many employers are trying to increase the flexibility of their corporate structure and adjust manpower in response to workload to achieve better allocation of human resource. Employers break some work into discrete errands and assign them to short-term contract employees, freelancers, etc. to complete. This kind of “gig” can be found in all walks of life and covers all levels (e.g. delivery driver or courier, trade fair assistant). Some odd jobs (e.g. translation, application development) that can be delivered entirely through online platforms can even break the territorial boundaries and time limits, improving work quality and efficiency.

The above-mentioned business arrangements are in line with the employment preferences of some young people. Before the epidemic, some young people who liked to dabble in foreign cultures often travelled around the world or participated in working holiday plans. Flexible work styles (e.g. part-time, slasher) were particularly popular among these young people. As for the general situation of youth employment, research by the International Labour Organisation shows that the global unemployment rate for youth (15-24 years old) is 13.6%. When discussing how technological advances in the “Fourth Industrial Revolution” will affect youth employment, young people around the world are worried that new technologies may take away their jobs. Paradoxically, the younger generation is more digitally savvy than the previous generation, but they are worried that their jobs may be replaced by robots and artificial intelligence.³⁹

Young people have always been an important customer group in the consumer market. The

³⁷ Zeno. (2020) *Strength of Purpose Study*.

³⁸ [‘Baby boomers’ wealth is 12 times greater compared to millennials. Here’s why](#) in *CNBC* of 8 August 2019.

³⁹ International Labour Organisation. *Global Employment Trends for Youth 2020*.

consumption habits of the new generation, who have been exposed to digital products since birth, have an even more important impact on omni-channel retailing. A study of global millennials and generation Z shows that the new generation has a strong social awareness (e.g. the impact of product production processes on water sources and air) and brand moral values (e.g. promoting equal opportunities), they choose to spend only in a way that align with their own values.⁴⁰

2.3.2 Local Development

Regarding the career prospects of local youth, a survey report shows that about 42% of college students are considering starting a business. Among those who plan to find a job after graduation, the largest number of college students (about 32%) express their aspiration to join the public administration, social and personal service industries. Overall, 62% of respondents said they would consider leaving Hong Kong to pursue opportunities. Among them, European countries and the United States are the most popular (about 36%), and 28% are willing to develop in mainland China.⁴¹ It can be seen that the retail industry is not the first choice for local young people. The main reasons are “long working hours, the need for shifts, and unattractive pay.” In addition, they also have to deal with difficult customers and handle complaints,⁴² which are obstacles to attracting young people to join the industry. A senior executive in the retail industry interviewed revealed that many candidates fail to show up at the time of their scheduled interviews. Even if a small number of young people attend to work after appointments, they end up quitting after a short period of time, resulting in recruitment work that lasts all year round. In addition, some interviewees pointed out that the low birth rate in Hong Kong in recent years, coupled with the reemergence of emigration waves, has caused a group of young and capable working people to immigrate overseas. It is also one of the reasons why recruitment has become more difficult in the past six months.

Even before epidemic prevention measures were tightened, enterprises were already facing manpower shortages. In response to the severe fifth wave of the epidemic, various industries reimplemented flexible working arrangements and controlled the number of employees

⁴⁰ Deloitte. (2021) *Global Millennial and Gen Z Survey*.

⁴¹ 香港城市大學人文社會科學院 (2018) 《港台兩地大學生的職業展望研究報告》。

⁴² Vocational Training Council. *Manpower Update Report - Retail Trade 2021*.

returning to the office.⁴³ All interviewees said it was necessary to maintain two-way communication with employees and seek their understanding in order to maintain normal operations amid greater manpower shortages. Most interviewees said that as customers become more sophisticated and discerning, their service standards and expectations continue to increase with each innovation in customer experience. Many of them first learn basic information about their favourite products online, and then go to brick-and-mortar stores to inquire about more detailed and in-depth product information. At this time, the salesperson needs to use professional knowledge to introduce the product so that customers can get the most intimate and personalised experience. As such, personal qualities and presentation skills are crucial.

In this era of uncertainty, on the one hand, organisations must adhere to their operational objectives, and on the other hand, they must be flexible and adaptable to effectively cope with future challenges. According to the three dimensions of change, some experts proposed three important skill areas and twelve enduring skills. The three important skill areas and the twelve related skills are creativity skills (insight / conversion / problem solving / agility), communication skills (influence / team building / trust / translation) and control skills (self-control / resource management / order / implementation).⁴⁴ As the senior retail executives interviewed pointed out, in today's retail environment where reality and virtuality blend, employees of any age and in any position must have the courage to face changes, remain curious about new things, and actively learn and solve problems in order to adapt this new retail era that emphasises "heart-centred, data-driven, and reconstruction of people, commodities, and stores."⁴⁵ For nurturing and retaining outstanding talents, provision of clear progression pathways, job rotation and departmental attachment programmes across various functions and locations can help employees to expand their scope of competency.

2.3.3 Competence Requirements

Under the influence of the above-mentioned sociocultural factors, retail professionals in Hong

⁴³ [〈【防疫措施】HSBC 滙豐只許一半員工返辦公室、恒地恒隆可在家工作 一文看各機構防疫措施〉](#)，香港經濟日報，2022 年 1 月 7 日。

⁴⁴ Flanagan, K. and Gregory, D. (2019) *Forever Skills: The 12 Skills to Futureproof Yourself, Your Team and Your Kids*. John Wiley & Sons Australia.

⁴⁵ 亞里研究院 (2017) 《C 時代 新零售—新零售研究報告》。

Kong need to enhance competency in various aspects which include:

- Gain insight into the changes of traditional consumer groups and the growth in emerging consumer groups so as to plan ahead
- Deepen the expertise of various products to assist different customer groups to select the most appropriate products and services
- Have a long-term vision and lifelong learning capabilities
- Have good personal qualities and digital proficiency

2.4 Technological Factors

In the “Global Competitiveness Report 2019” of World Economic Forum, Hong Kong’s infrastructure ranks third in the world,⁴⁶ reflecting high degree of connection with mainland China and the world. However, the epidemic has caused huge damage to the global supply chain network, causing retailers to make rearrangements and even reshape the entire supply chain. In order to cope with the ever-changing potential risks, many retailers have begun to think about how to make use of technology to achieve a more resilient operating model. In the process of writing this report, the factor most frequently mentioned by the interviewees was technology.

2.4.1 Global Trend

Some studies show that 59% of global consumers said they had high levels of interaction with brick-and-mortar stores before COVID-19, but today less than a quarter (24%) see themselves in that high-interaction category.⁴⁷ Affected by the epidemic, more and more consumers are starting to shop online. When the brand’s back-end management seamlessly integrating in the supply chain of capital flow, information flow and logistics, it allows consumers to enjoy consumption smoothly. New consumption behaviours will turn into habits, and consumers will not “to consume” gradually, but “consuming” at any time. In today’s fast-paced world

⁴⁶ Brand Hong Kong. (2021) *Factsheet: Building for the future*.

⁴⁷ Capgemini Research Institute. (2020) *The consumer and COVID-19: Global consumer sentiment research in the Consumer products and retail industry*.

with greater demands for quality, people are increasingly pursuing personalised services. “Discovery Commerce” came into being to meet consumer requirements for impromptu shopping, simplified product information and services, and fast checkout.⁴⁸ In response to this new consumption model, merchants use the “traces” left by consumers online and use big data to analyse their interests and habits into trends, develop applications, use live streaming for shopping, etc. to let consumers enjoy personalised consumption pleasure all day long.

In fact, some brands have begun to cooperate with gaming platforms to provide potential customers with immersive experiences in the virtual space. Inventor Raymond Kurzweil predicted that by 2030, people will spend more time in the metaverse than in the real world. Virtual reality technology will completely immerse users in a real visual and auditory experience. If used in learning-related activities, it will help improve users’ memory.⁴⁹ Different from virtual reality, the virtual world of the Metaverse is not only used for video games, but also for other entertainment (e.g. sports, fashion shows). Its importance lies in its ability to accept digital assets (e.g. digital artwork, virtual characters and equipment). In the Metaverse market, embodying the value of non-fungible tokens through virtual currency is one of the methods to convert digital assets into real assets. Industry research estimates that the market size of Metaverse may increase to US\$800 billion by 2024.⁵⁰ The interviewees said that they are actively studying the feasibility of developing the Metaverse market. The main challenge brought by the Metaverse is how to interact with a large number of users simultaneously and instantly; this involves issues such as system lag and language barriers.

E-commerce and the epidemic have successively changed the entire supply chain ecology, and have also made retailers reflect on the effectiveness of their procurement strategies. Since the epidemic led many countries to impose city lockdowns, even a dual procurement base is not enough to maintain normal supply. Technological advancement allows enterprises to use global procurement channels to strengthen existing supply chain networks to reduce risks.⁵¹

⁴⁸ [〈2022 年網絡商務新趨勢 洞悉秘技爭取市場優勢〉](#), hk01.com, 2022 年 1 月 18 日。

⁴⁹ [‘Ray Kurzweil + Disruptive Technologies and Dangerous Ideas’](#) by Diamandis, P. (2017)

⁵⁰ Hang Seng Bank. (2022) *IQ 2022 Investment Outlook: Prepare for High Inflation & Three important trends you need to watch*.

⁵¹ HKTDC Research. [‘The Post-Pandemic World: Sourcing Base and Product Development Expansion’](#). 28 September 2020.

Hence, when global enterprises reshape their supply chains, they no longer purely pursue speed and cost, but also focus on flexibility and build multiple procurement and multi-modal transportation networks in logistics and transportation.⁵²

2.4.2 Local Development

Although Hong Kong's information and communications technology infrastructure is well-developed, and its mobile phone penetration rate and household broadband coverage are among the highest in the world, the extent of online shopping among Hong Kong consumers is far less than that of mainland China, South Korea, and Japan.⁵³ This is largely because Hong Kong is a small place with good public transport and very convenient for shopping. However, since the outbreak of the epidemic and the implementation of social distancing measures, Hong Kong retailers have realised that they must step up the pace of e-commerce development. Coupled with the rapid development of the “stay-at-home” economy, surveys show that more than 40% of Hong Kong consumers are susceptible to impromptu shopping induced by social media.⁵⁴ In fact, in the first four months of 2021, Hong Kong's total online retail sales exceeded HK\$8.1 billion, over 50% (53%), more than the same period last year, and much higher than the overall retail sales growth of 8.3%. However, the online sales segment in Hong Kong only accounts for 7% of total retail sales. For merchants with physical stores, online sales increased by 81% in the first four months of 2021, which is much higher than the 28% sales growth of online stores only, reflecting that merchants are actively exploring online sales.⁵⁵

Given that Hong Kong is a densely populated city, sometimes people go out for leisure. This is the main reason why consumers are willing to go out to pick up the goods themselves after ordering online. So, most of the senior retail executives interviewed said that virtual stores cannot fully replace physical stores even with high rent pressure. Only by combining physical stores and platforms can the retailers more effectively respond to the needs of local

⁵² Deloitte. (2021) *Global Powers of Retailing*.

⁵³ Research Office of Legislative Council Secretariat. (2020) *Statistical Highlights on E-commerce in Hong Kong*.

⁵⁴ MediaOnAsia (2021) [《2022 年及未來數碼消費者調查》](#)。

⁵⁵ [〈陳茂波：電子支付成為未來香港零售市場增長的關鍵〉](#)，紫荊網，2021 月 6 月 15 日。

consumers. In response to this new consumption model, retailers must not only think about how to connect different touch points of consumers throughout the customer experience journey, but also provide consistent high-quality customer services. At the technological level, it involves the integration of technologies such as Artificial Intelligence, Automation, Blockchain, and the Internet of Things, as well as the application of technologies such as Augmented Reality, Virtual Reality, and Mixed Reality; so as to increase the immersive shopping experience and to help consumers select products and even make purchase decisions, last-mile delivery, after-sales customer relationship management and other aspects.

Many local consumers once had reservations about the security of online payments. With both the launch of electronic consumption vouchers by the HKSAR Government and the consideration of epidemic prevention, online consumption has become more and more popular. Contactless and cashless payment methods have become prevalent. However, there are pros and cons to cashless payment methods. Without cash payment, it is easy for people to consume uncontrollably⁵⁶ and their vigilance against fraud becomes frail. In addition, consumers' personal data is spread across different merchants, and retailers with huge data must safeguard network security to ensure that consumer experience and customer privacy are not affected.

2.4.3 Competence Requirements

Under the influence of the above-mentioned technological factors, retail professionals in Hong Kong need to enhance competency in various aspects which include:

- Detect the changes in consumers' access to information and buying patterns so as to make more effective responses and planning
- Understand how fintech can help users operate in a more convenient and quick manner, thereby enabling enterprises to improve efficiency and service quality
- Advance with the times, keep an open mind to the ever-changing technology, understand and apply various tools and channels that help to expand business (e.g. social media, cloud computing, mobile broadband)
- Enhance awareness of cybersecurity and establish protection of information and other

⁵⁶ Liang Lu-Hai. [‘Does e-money make you spend more?’](#) in *BBC* of 5 December 2019.

systems against the risk of cyber attacks

2.5 Legal Factors

Consumers in the new retail era heavily rely on the Internet to explore new products. They enjoy to switch between different social media platforms, share experience, post comments and make reference to other consumers' experience. However, when placing an order, it totally depends on personalised customer experience. To cater to this change in consumer behaviour, enterprises need to let consumers feel that they are interacting with the same brand at any point of contact so as to achieve diversity of personalised experience.⁵⁷ Compared to traditional marketing, retailers undertaking digitally driven strategies confront new critical legal challenges related to network security, privacy and intellectual property rights throughout this process. Effective policies are needed to address these emerging issues, as digital engagement methods introduce risks very different from traditional marketing.

2.5.1 Global Trend

Increasing number of enterprises realise that data sharing can accelerate digital transformation in business. Gartner predicts that by 2023, enterprises that promote data sharing will outperform other market players on most business value metrics.⁵⁸ Obviously, data is a very valuable and attractive asset that easily draws attention to criminal activities. Hackers steal data by eavesdropping and cracking weakly encrypted data streams, and then carry out illegal activities by leaking inside information and collusive arrangements.⁵⁹ The *United Nations Convention against Corruption* is a legally binding instrument for universal anti-corruption.

The effectiveness of data sharing depends on cybersecurity. As an emerging field of security governance in the world, governments of various countries are constantly formulating new network security and data regulations. Concerning network security, the United States

⁵⁷ 王曉鋒, 張永強, 吳笑一 (2015) 零售 4.0: 零售革命, 邁入虛實整合的全通路時代, 天下文化。

⁵⁸ Gartner. [Press Release: Gartner Survey Finds 72% of Data & Analytics Leaders Are Leading or Heavily Involved in Digital Transformation Initiatives](#) dated 5 May 2021.

⁵⁹ World Bank Group. *Using Data and Transparency to Fight Corruption in Public Procurement*.

Department of Defense (DoD) launched *Cybersecurity Maturity Model Certification (CMMC)*. It is estimated that by 2026, all procurement contracts will contain CMMC requirements, affecting 300,000 contractors in the DoD supply chain.⁶⁰ As a national development strategy, the Spanish government established the National Cybersecurity Institute (INCIBE) to build a business ecosystem for the sector and attract talents, strengthen the cybersecurity of individuals and enterprises, and consolidate Spain as an international cybersecurity hub.⁶¹ In terms of privacy protection, the European Union passed the *General Data Protection Regulation* in 2016, the United States *Clarifying Lawful Overseas Use of Data Act / CLOUD Act* came into effect in 2018, and China passed the *Personal Information Protection Law of the People's Republic of China* in 2021. All of these facilitate international exchanges and cooperations on data protection; and promote mutual recognition of data protection rules and standards among countries, regions, and international organisations. Digital marketing is closely associated with network security and customer data. Enterprises must understand the latest relevant policies of various countries and abide by all terms of use of social media to avoid running into trouble.

Indeed, social media has become a major channel for customers to discover, learn about and buy products. To stand out from the crowd, enterprises need to tactfully include photos, videos, music, tweets, etc. on social media posts that can draw immediate attention and even trigger emotional responses, so as to communicate brand mission, value proposition and style in a consistent manner with customers.⁶² Unless an enterprise has a dedicated team responsible for publicity and production, most enterprises hire production companies, internet celebrities, micro-influencers and other agencies to handle. In this case, enterprises must be cautious about the issues of intellectual property rights. Intellectual property rights can be traded through technology transfer, licensing, franchising, merchandising, copyright trade, etc. By licensing intellectual property rights (e.g. trademarks, patents), enterprises can enhance their brand advantages and thus create greater profits. Therefore, while enterprises protect their own, they must also ensure that they do not infringe on intellectual property rights of others.

⁶⁰ [‘Cybersecurity Maturity Model Certification \(CMMC\) Outlook Special Report’](#) of *National Defense Magazine*, US.

⁶¹ [Spanish National Cybersecurity Institute](#).

⁶² Rapaille, C. (2006) *The Culture Code: An Ingenious Way to Understand Why People Around the World Live and Buy as They Do*. Crown.

2.5.2 Local Development

Compared with shopping in brick-and-mortar stores, it is difficult for consumers to distinguish an original product from a counterfeit when shopping online. In addition, the checkout method tends to be simpler. Sometimes, before the fee and renewal method are clarified, the transaction is completed within a few clicks. In addition to the basic legal protection in Hong Kong (e.g. *Control of Exemption Clauses Ordinance*, *Unconscionable Contracts Ordinance*), some laws have come into effect to strengthen the protection of consumer rights (e.g. Hong Kong Customs and Excise Department is responsible for implementing *Consumer Goods Safety Ordinance*, *Toys and Children's Products Safety Ordinance*, *Trade Descriptions Ordinance* and *Weights and Measures Ordinance*). In addition, specific licences, permits, certificates and approvals are required to start certain retail business operations in Hong Kong (e.g. all shops providing eye examination services and selling controlled substances are legally required to hire optometrists and pharmacists respectively). In case of wrong goods or unsatisfactory service, consumers can resolve disputes through complaint mechanism. In 2020, a total of 30,935 complaint cases were received, marking a record high in Hong Kong since 2015.⁶³ The number of complaints dropped by 11% (27,382 cases) in the following year, yet the amount involved reached HK\$1.17 billion, a steep increase of more than double.⁶⁴ In the two prosperous years of online shopping, more than half of the complaints were service-related (2020: 52%; 2021: 54%), while the remainder were product-related.⁶⁵

In addition to external customers, there are laws in Hong Kong to ensure that enterprises must treat their internal customers (i.e. employees) fairly. Statutory minimum wage, *Personal Data (Privacy) Ordinance*, anti-discrimination ordinances, equal opportunities legislation, etc. are some examples. Undeniably, these legislative and regulatory changes have imposed cost and operational constraints on business, making the business environment more complex and stringent. It has implications for businesses of any size. Some interviewees mentioned that

⁶³ Consumer Council. [*Press Release: 'Over 30,000 Consumer Complaint Cases in 2020 Surge in Internet Shopping Complaints Triggered by "Stay-at-Home Economy" Face Masks and Travel Matters Became the Product and Category Attracting Most Complaints'*](#) dated 4 February 2021.

⁶⁴ [〈消委會去年接獲投訴涉款 11.7 億元 增加超過一倍〉](#), Now 新聞, 2022 年 2 月 7 日。

⁶⁵ Counsumer Council. [Complaints and Services](#).

Hong Kong government hired a large number of part-timers to participate in the epidemic prevention and anti-epidemic work at a wage significantly higher than the statutory minimum wage. It directly made retailers more difficult to recruit sufficient candidates to fill vacancies.

2.5.3 Competence Requirements

Under the influence of the above-mentioned legal factors, retail professionals in Hong Kong need to enhance competency in various aspects which include:

- Conduct in-depth analysis of various legal risks before opening up new markets; and enable the enterprise to operate legally and compliantly in new markets
- Gain in-depth understanding of the latest developments in network security, privacy, intellectual property rights, employment regulations, etc. in various markets; and assess the impact on business operations, costs and taxes
- Enhance awareness of doing business in a compliance-first approach, respect intellectual property rights, oppose commercial bribery, fulfil corporate responsibilities, etc., so as to enable the sustainable and healthy development of enterprises

2.6 Environment Factors

More and more consumers support “conscious consumption” and advocate responsible shopping. Only products that prioritise transparency are gaining increasing popularity among consumers. Hence, responsible enterprises are actively seeking to attract more investment and mitigate risks by proactively providing reassurances to investors, customers, etc. Nowadays, many enterprises are adopting sustainable business practices by incorporating social responsibility into their operations.⁶⁶

2.6.1 Global Trend

Consumers expect enterprises to meet their needs while also fulfilling their stated social and environmental responsibilities.⁶⁷ Therefore, introducing the principles of circular economy

⁶⁶ Rangan, K., Chase, L.A. and Karim, S. (2012) *Why Every Company Needs a CSR Strategy and How to Build It*. Harvard Business School Working Paper 12-088, 5 April.

⁶⁷ IBM Institute for Business Value (2022) *Consumers Want It All: Hybrid Shopping, Sustainability, and Purpose-driven*

into the business model does not only fulfill corporate social responsibilities, but also aligns with global consumption trends. The circular economy proposed by experts in different fields has different focuses, but the main theme is an economic system that reduces waste and sustains the use of resources. An effective recycling system forms a closed-loop system. It maximises conservation by reducing waste, promoting reuse through sharing and repair, and recovering materials through recycling. This approach helps minimise pollution and carbon emissions. Circular economy does not only pay attention to environmental protection, but more importantly, it answers what business model and how to conduct transactions to achieve true sustainable development and make humans and nature coexist harmoniously.

In response to the Sustainable Development Goals adopted by the United Nations in 2015, many countries around the world have included circular economy in their sustainable development agenda. For instance, following the launch of the Circular Economy Action Plan in 2015, the European Union introduced an updated version in 2020, expanding the scope of promoting the circular economy from localised demonstrations to mainstream applications. This initiative aims to generate more job opportunities and enhance global competitiveness.⁶⁸ As for China, in order to build a resource recycling industry system and a waste material recycling system, the National Development and Reform Commission announced five major projects and six major actions in the “14th Five-Year Plan for Circular Economy Development”. Compared with 2020, specific goals include increasing the output rate of major resources by approximately 20%, reducing energy consumption per unit of GDP and water consumption per unit of GDP by approximately 13.5% and 16% respectively, and achieving a comprehensive utilisation rate of bulk solid waste of 60%. The utilisation of scrap steel reaches 320 million tons, and the output value of the resource recycling industry reaches 5 trillion yuan, etc.⁶⁹

In fact, the epidemic has changed global consumption habits. The second-hand clothing market is growing at a rapid pace, according to an annual resale report. In 2020, 33 million consumers purchased second-hand clothing for the first time, and 76% of them planned to

Brands.

⁶⁸ European Commission. (2020) *Circular Economy Action Plan: For a cleaner and more competitive Europe*.

⁶⁹ [國家發展改革委發佈《“十四五”循環經濟發展規劃》](#)。

purchase more second-hand clothing in the next five years. The total output value of the second-hand clothing market in 2021 is US\$36 billion, and it is expected to double to US\$77 billion by 2025. This growth rate is eleven times higher than the general retail clothing market.⁷⁰

In line with the concept of circular economy, many enterprises have begun to establish mechanisms to simplify product recycling. Furthermore, the promotion of personalised experience or customisation has contributed to a certain extent in fostering on-demand production, effectively reducing the issue of over-production. The benefits that personalised experiences bring to enterprises are indeed significant. A company once conducted a comparative analysis and discovered that customers who enjoy highly personalised experiences exhibit a substantial 40% increase in average consumption. What is even more encouraging is the corresponding 20% rise in the “Net Promoter Score”, which serves as an indicator of customer loyalty.⁷¹

2.6.2 Local Development

On the issue of sustainable development, consumers are becoming more aware of ecological conservation and environmental protection, and they expect brands to increase transparency and fulfill their social responsibilities.

A global survey on how the private sector is responding to climate change has revealed that many enterprises perceive climate change as both a significant threat and a major opportunity for their business strategies. However, only a few enterprises are capable of formulating strategic responses or assessing how long-term climate risks may impact their markets.⁷² In order to help investors understand a company’s response and risk management capabilities, starting from 2016, companies listed in Hong Kong must disclose relevant information in accordance with the “Environmental, Social and Governance Reporting Guide” issued by the Hong Kong Exchange. In 2019, listed companies were required to disclose additional key

⁷⁰ thredUP. (2021) *Resale Report*.

⁷¹ <https://oosga.com/industries/retail/>

⁷² United Nations Global Compact, United Nations Environment Programme, Oxfam and World Resources Institute. (2011) *Adapting for a Green Economy: Companies, Communities and Climate Change – A Caring for Climate Report*.

environmental performance indicators, on top of reporting on their management policies and strategies.⁷³ This guide undoubtedly makes companies pay more attention to their business models and non-financial performance.

In terms of business model and non-financial performance, some senior retail executives interviewed believe that treating employees well can significantly reduce the turnover rate compared to their business associates (e.g. continuously provide training and support to older employees with lower academic qualifications to prevent them from being eliminated by technology), treat customers well so that they can have a healthy and happy life (e.g. ensure products do not contain harmful materials), treat the environment well and promote efficient use of resources (e.g. produce on demand, reduce unnecessary packaging), and actively cooperate with different stakeholders to reduce waste (e.g. discuss with the landlord when renting out, and retain suitable decorations for the next tenant), etc. are all manifestations of a company's strength.

In any case, environmental, social, and governance factors are crucial pillars of corporate sustainable development and play an integral role in the digital transformation strategy of businesses.

2.6.3 Competence Requirements

Under the influence of the above-mentioned environmental factors, retail professionals in Hong Kong need to enhance competency in various aspects which include:

- Understand the increasing importance of sustainable development and corporate social responsibility to investors and stakeholders that can be applied to brand building with the primary aim of making a positive impact for employees, customers and/or shareholders
- Convert the information, knowledge and predictions about environmental factors into innovation capabilities and strategic actions
- Keep up-to-date with specific product knowledge (especially related to environmental factors) to effectively deliver consistent product and/or service messages to customers in different approaches

⁷³ *Hong Kong Exchange's Rules and Guidance, Appendix 27 Environmental, Social and Governance Reporting Guide.*

2.7 Conclusion

Summarising the PESTLE analysis in this chapter, retail professionals in Hong Kong need to enhance competency in various aspects which include:

Political	<ol style="list-style-type: none">1. Enhance awareness of global and local political development, and its potential impact on business and daily operations2. Analyse risks proactively, prevent and manage risks with target and plans3. Implement agile planning and change management
Economic	<ol style="list-style-type: none">4. Pay close attention to the macro-economic development and the impact of various economic indicators on consumers and enterprises5. Make the best preparations for enterprises based on highly reputable market forecasts6. Make good use of existing available resources, including stores, platforms, manpower, technology, open and free resources that do not involve copyright, etc., to control operating costs
Sociocultural	<ol style="list-style-type: none">7. Gain insight into the changes of traditional consumer groups and the growth in emerging consumer groups so as to plan ahead8. Deepen the expertise of various products to assist different customer groups to select the most appropriate products and services9. Have a long-term vision and lifelong learning capabilities10. Have good personal qualities and digital proficiency
Technological	<ol style="list-style-type: none">11. Detect the changes in consumers' access to information and buying patterns so as to make more effective responses and planning12. Understand how fintech can help users operate in a more convenient and quick manner, thereby enabling enterprises to improve efficiency and service quality13. Advance with the times, keep an open mind to the ever-changing technology, understand and apply various tools and channels that help to expand business (e.g. social media, cloud computing, mobile broadband)

	14. Enhance awareness of cybersecurity and establish protection of information and other systems against the risk of cyber attacks
Legal	<p>15. Conduct in-depth analysis of various legal risks before opening up new markets; and enable the enterprise to operate legally and compliantly in new markets</p> <p>16. Gain in-depth understanding of the latest developments in network security, privacy, intellectual property rights, employment regulations, etc. in various markets; and assess the impact on business operations, costs and taxes</p> <p>17. Enhance awareness of doing business in a compliance-first approach, respect intellectual property rights, oppose commercial bribery, fulfil corporate responsibilities, etc., so as to enable the sustainable and healthy development of enterprises</p>
Environmental	<p>18. Understand the increasing importance of sustainable development and corporate social responsibility to investors and stakeholders that can be applied to brand building with the primary aim of making a positive impact for employees, customers and/or shareholders</p> <p>19. Convert the information, knowledge and predictions about environmental factors into innovation capabilities and strategic actions</p> <p>20. Keep up-to-date with specific product knowledge (especially related to environmental factors) to effectively deliver consistent product and/or service messages to customers in different approaches</p>

Chapter 3 Core Functional Areas of Retail Industry

The Retail ITAC proposed the core functional areas for the Specification of Competency Standards (Version 2.0) as follows:

1. Sales, Marketing and Multi-channel Sales Management

The core function of sales, marketing and multi-channel sales management requires the use of sales techniques and knowledge of marketing and multi-channel sales management to formulate comprehensive online and offline sales strategies as well as marketing plans that take into account customer service management. The scope of this core functional area involves promotion strategy (e.g. cross-brand promotion, multi-channel promotion), market research (e.g. website data analytics), marketing plan (e.g. partnership marketing, community marketing), product promotion, product pricing, monitoring product sales performance, team management, etc. that enable enterprises to achieve good results in product sales and marketing.

2. Data Analytics

The scope of this core functional area includes ensuring seamless and efficient management of digital content across various channels, formulating strategic key performance indicators, analysing website development strategies, establishing and managing online trading systems and websites, as well as analysing and managing content on different social media platforms that help companies expand sales and attract consumers' attention.

3. Customer Services

Retail is customer-centric. Practitioners must understand the needs of customers and be able to use customer service knowledge, good communication skills, and artificial intelligence technology to provide services that satisfy customers. The scope of this functional area includes formulating omni-channel customer service strategies, understanding customer psychology, skills in handling customer service, handling customer complaints, customer service quality management, etc., and maintaining professional ethics and professional image in order to provide professional and high-quality omni-channel customer services.

4. Customer Relationship Management

The goal of customer relationship management is to cultivate long-term customer relationship and enhance customer lifetime value. The scope of this functional area is to improve customer satisfaction and loyalty by formulating customer relationship management strategies, implementing customer relationship management, designing loyal customer programmes, etc.

5. Merchandising / E-commerce Merchandising

The scope of this functional area covers formulating procurement strategies and procedures for selecting suppliers and handling procurement activities. Under different circumstances, practitioners need to apply different procurement knowledge (e.g. taxation, customs affairs, cost accounting), methods (e.g. group procurement, supply chain procurement), and skills (e.g. supplier management, order management).

6. Supply Chain Management

The scope of this functional area involves improving supply and distribution chain, risk management, inventory control, cross-border logistics, managing goods delivery and distribution, handling freight, warehousing and customs declaration, commodity delivery, logistics safety and occupational safety and health management, etc. Practitioners should possess the knowledge and skills required to understand the goods, master the cargo handling process and procedures, and the relevant requirements for cargo transportation and handling.

7. Store Operations

Store operations can be divided into physical stores and virtual stores, which involve personnel management, team building, excellent sales services, etc. For physical stores, the scope of this functional area covers store leasing management, store cleanliness and safety, inventory control, handling goods (e.g. classification, display, packaging, delivery, returns, etc.), prevention of theft, management of store facilities and maintenance, prevention of goods loss, crisis management, etc. In terms of virtual stores, it covers e-commerce system operation, streamlining the management process of multiple stores (including physical stores), etc. While most of the aspects can be clearly defined, some are still overlapping; such as developing electronic payment management measures. Regardless, both ensure that the store operates effectively to meet customer expectations and needs.

8. Information Technology

E-commerce and omni-channel sales are driving the transformation of traditional businesses. Information technology plays a key role in this process. The scope of this functional area covers the application of technology, protecting information systems, networks and data assets, and maintaining operational efficiency while complying with regulations. Applications of technology include establishing data databases, managing business intelligence, corporate information plans and technology projects, applying new technologies to carry out and improve retail services, operation and maintenance of information technology equipment, etc. Aspects related to protecting information systems, networks and data assets, and maintaining operational efficiency while complying with regulations include the establishment of online retail platforms, back-end systems or integration of old and new systems, as well as planning, development and evaluation of online business, brand building, sales systems, payment systems, network security, business risks and outsourcing services, etc.

9. Strategic and ESG Management

The scope of this functional area covers strategic management and environmental, social, and corporate governance (ESG). Management staff should be responsible for the formulation of business strategies, business plans, business continuity plans and financial management policy, and the monitoring of financial performance and environmental protection strategies, etc. All staff should comply with the business and legal requirements in implementing the above-mentioned business strategies, policies, etc. of the organisation in order to carry them through and achieve the expected results. Corporate image should also be built and maintained in the process of strategic and ESG management.

10. Specific Product Knowledge

The scope of this functional area covers four major types of specific retail products, namely: (1) food / alcohol / tobacco, (2) consumer goods (communications equipment and electrical products), (3) durable goods (furniture), and (4) clothing and footwear. The sales of these types of specific retail products requires special knowledge in product handling procedures, display arrangements, demonstration and selling techniques, retail services, etc.

11. Human Resource Management & Development

The scope of this functional area involves manpower and personnel management, training and development. The aspect of manpower and personnel management covers the formulation of human resource strategies, recruitment and selection of employees, handling of staff salaries and benefits, staff appraisal policy, handling of labour relations, etc. as well as compliance with labour legislation. The aspect of training and development covers the formulation of staff training development plans, provision of in-service training and training-related management.

Hong Kong Qualifications Framework
Specification of Competency Standards
for the Retail Industry in Hong Kong (Version 2.0)

Part 2: Analysis Results of Major Jobs in the Retail Industry

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Preface

The Retail Industry Training Advisory Committee (ITAC) assists the industry in developing a set of industry skills standards known as the Specification of Competency Standards (SCS). The SCS defines the competency requirements and performance standards for major jobs in the industry. The SCS for retail and e-commerce were launched in 2014 and 2017 respectively. As the retail industry continues evolving and transforming, the Retail ITAC has updated these two sets of SCS to keep pace with changing industry needs. LRT Consulting was appointed the Professional Writer of this project, which included reviewing the development trends of the industry and the changes in each core functional area, analysing the duties in the newly added or changed core functional areas so as to provide the industry with a roadmap for career and learning progression, and enriching the existing competency units to meet the actual requirements of major jobs.

Under the Qualifications Framework (QF), job-based qualifications are matched to units of competency (UoCs) in the SCS. To assist practitioners and learners with employment, career development and further education, the roadmap is supplemented by an overview of major jobs' functional areas and core competencies. Between May and July 2022, the Professional Writer Team solicited input from industry professionals through questionnaires and focus group meetings. This verified key areas of jobs and core competencies of each major job post.

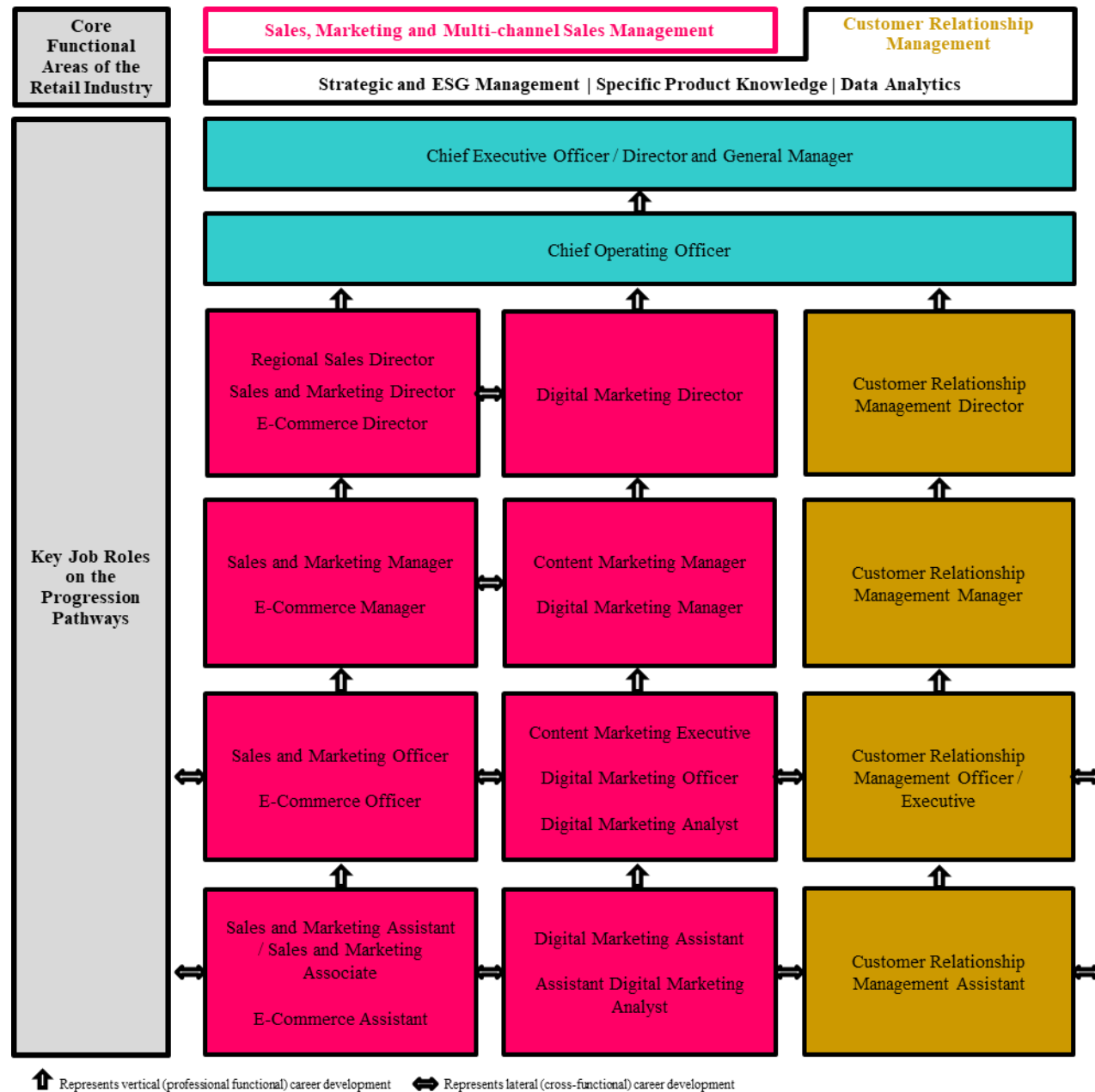
The following are key takeaways from the job analysis process:

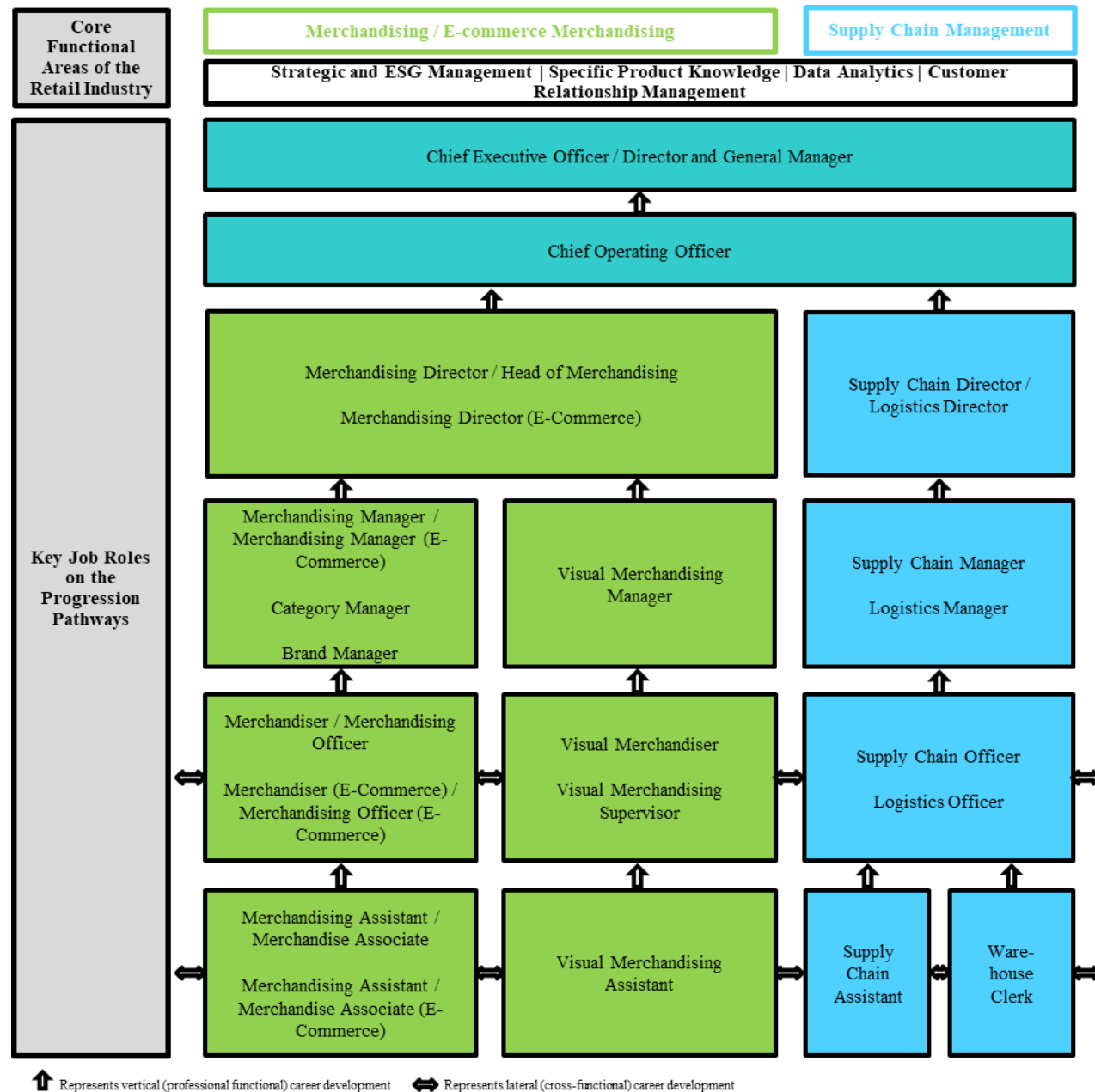
- **Related to Sales, Marketing and Multi-channel Sales Management | Customer Relationship Management**
 - Although it is common for small and medium enterprises (SMEs) to have one person hold the positions of Chief Executive Officer, Managing Director, Chief Operating Officer, and Regional Sales Director, the job scope and core competencies of these four roles differ significantly in large enterprises. Therefore, it is recommended to single out the Chief Operating Officer position. Similarly, the main job scope and core competencies of the Regional Sales Director align closely with those of the Sales and Marketing Director, with the only distinction being the size of the jurisdiction. Hence, it is proposed to merge these two positions.
 - In terms of sales and marketing, there is no significant difference between brick-and-mortar stores and e-commerce, so it is recommended to merge the main jobs of the two.
 - In the new retail environment, it is increasingly important to make good use of artificial intelligence to enhance the ability of creativity.
- **Related to Merchandising / E-commerce Merchandising | Supply Chain Management**
 - The primary distinction between a brick-and-mortar store and an e-commerce platform lies in the physical space available. Traditional stores face constraints due to limited space and must prioritise displaying high-value products, resulting in restrictions on the variety and quantity of items offered. However, virtual stores do not face these limitations. While the core competencies required for merchandising in brick-and-mortar stores and e-commerce are similar, the difference lies primarily in the type and quantity of goods. Therefore, it is advisable to merge the key responsibilities of merchandising and e-commerce merchandising.
 - Data analytics can help understand customer buying behaviour and improve the accuracy of merchandising.

- Brick-and-mortar stores and e-commerce have completely different considerations and ways of displaying goods. Brick-and-mortar stores must attract customers through elements such as aesthetics, so that they can become interested in the product through their senses such as sight and touch. Virtual stores, on the other hand, use layouts, banners, etc., to attract customers to click and browse, discover various products and place orders and checkouts.
- **Related to Customer Services | Store Operations | Human Resource Management & Development**
 - When it comes to customer service, not all companies opt to implement mystery shopper programmes. For Customer Service Managers, effective management of partnerships becomes even more crucial. Furthermore, with the rise of the new retail trend, customer touchpoints have become all-encompassing, necessitating consideration of both online and offline interactions.
 - The role of the Retail Operation Director extends beyond the development of operating procedures for the retail sales system. The UoC title should be replaced with “retail sales system,” encompassing a comprehensive point-of-sale checkout solution. This includes implementing features such as automated scanning for checkout and enabling direct e-wallet usage on mobile devices. These enhancements aim to reduce queuing procedures and optimise the overall consumer experience.
 - In terms of human resource management & development, there is an increasing demand for fragmented training. Personnel responsible for training should possess fundamental skills (e.g. video editing) for producing digital learning resources.
- **Related to Data Analytics | Information Technology**
 - The Information & Communications Technology (ICT) industry is seeking industry input on its draft progression pathway. The retail industry can utilise this pathway as a blueprint for data analytics and incorporate additional UoCs specific to the retail sector, as needed. Therefore, jobs in data analytics will require a blend of technical competencies from the ICT industry and a specific combination of skills tailored to the retail sector, if applicable. While the consultation paper is currently available only in English, a Chinese version of the new SCS will be published by the end of 2022. Hence, the document is currently presented in a hybrid format.
- **Applies to All of the Above Functional Areas**
 - Public relations crisis management is a highly significant competency that should be incorporated into each core functional area and level, reflecting the relevant performance requirements in this field (e.g. formulating and implementing policies for public relations crisis management).

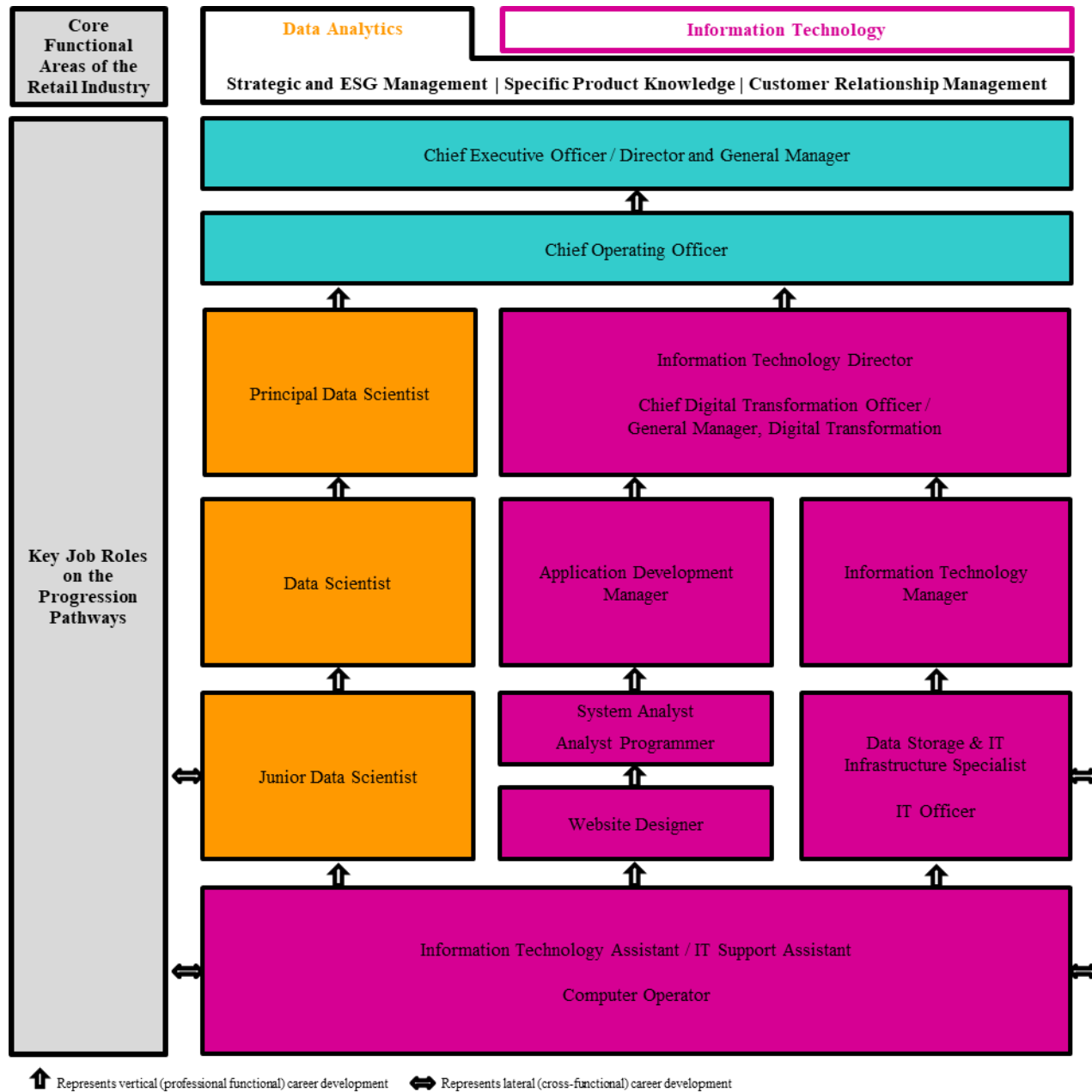
Taking into consideration the above takeaways and discussion outcomes, the Professional Writer Team has compiled this report to update the Retail ITAC on the revised roadmap for progression. The report outlines the main job scopes and core competencies of each major role.

Progression Pathways









Job 1	Chief Executive Officer / Director and General Manager	
Major Job Scope		Associated UoC Title and Code
<ul style="list-style-type: none"> • Develop holistic business and talent strategies for different retail outlets, functional groups and departments of the organisation • Define or implement a set of implementable policies (including Corporate Social Responsibility (CSR) and Environmental, Social and Governance (ESG)) based on the organisation's vision, mission, business strategy and plan, etc., to optimise the governance of the organisation in the long run • Comply with relevant business laws and build a good organisational image in the general public and customers • Conduct comprehensive analysis and evaluation of various factors (e.g., market environment, industry development trends, past and present marketing performance, organisational operational strategies) to formulate feasible and forward-looking market development objectives • Assume responsibility for the overall performance and investment management of the organisation • Implement corporate profit management practices to the extent permitted by law 		<ul style="list-style-type: none"> • Formulate business and talent strategies 111236L7 • Develop and implement policies of the organisation 111230L6 • Build an organisational image 111233L6 • Monitor the retail market trends and formulate market development objectives 111270L6 • Manage corporate costs 111228L5 • Manage corporate surplus 111229L5

Note: The UoC codes prefixed with “HRM” indicate that they are sourced from the Specification of Competency Standards (SCS) for the Human Resource Management sector. The UoCs prefixed with “I” and associated with the three data analytics-related positions are derived from the SCS for the Information and Communications Technology (ICT) industry.

Job 2	Chief Operating Officer	
Major Job Scope		Associated UoC Title and Code
Operational Strategies and Policies: <ul style="list-style-type: none"> • Develop holistic business and talent strategies for different retail outlets, functional groups and departments of the organisation • Define or implement a set of implementable policies (including Corporate Social Responsibility (CSR) and Environmental, Social and Governance (ESG)) based on the organisation's vision, mission, business strategy and plan, etc., to optimise the governance of the organisation in the long run • Develop a sustainable business strategy and implementation plan that complies with regulations and is best suited for the organisation's use to protect the organisation's interests • Plan and formulate financial management policies and programmes with the use of information / data on costs, expenses and profits to maximise economic benefits for the organisation 		<ul style="list-style-type: none"> • Formulate business and talent strategies 111236L7 • Develop and implement policies of the organisation 111230L6 • Formulate sustainable business strategies 111231L6 • Formulate financial management policies 111232L6
Crisis Management: <ul style="list-style-type: none"> • Develop risk management policies and procedures, establish and maintain fair business practices, protect intellectual property rights and avoid infringements, and strengthen consumer confidence in the organisation • Formulate public relations crisis management policies in the relevant areas of work and make appropriate adjustments as necessary 		<ul style="list-style-type: none"> • Develop risk management policies and procedures related to intellectual property (IP) 111235L6 • Formulate crisis management policies in public relations for relevant areas of work, and monitor the progress of responding to and handling crisis 111227L5

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Core Functional Area: Sales, Marketing and Multi-channel Sales Management

Job 3	Regional Sales Director / Sales and Marketing Director / E-Commerce Director	
Major Job Scope		Associated UoC Title and Code
Trend Identification and Strategy Formulation: <ul style="list-style-type: none"> Develop branding and multi-channel sales management strategies to enhance the organisation's brand image and increase sales Conduct comprehensive analysis and evaluation of various factors (e.g., market environment, industry development trends, past and present marketing performance, organisational operational strategies) to formulate feasible and forward-looking market development objectives Collect and analyse market research information on retail services/products and formulate cost-effective market research plans Forecast product sales performance in order to formulate the business planning process and boost the sales 		<ul style="list-style-type: none"> Formulate brand promotion and Multi-channel sales management strategies 111259L5 Monitor the retail market trends and formulate market development objectives 111270L6 Formulate a market research proposal 111258L5 Forecast product sales performance 111260L5
Operations Management: <ul style="list-style-type: none"> Manage all sales channels for retail brands to build customer engagement, corporate image and increase sales Develop a set of marketing, marketing channels and media strategies that comply with regulations and best suit the organisation's business needs to enhance the organisation's / brand's awareness and market share Develop a suitable after-sales service plan to assist in the development of retail business Analyse and evaluate sales team's performance, market and competitors' conditions, etc., so as to formulate sales team management strategies Formulate a competitive product pricing strategies in order to develop the retail business and to increase competitiveness of the organisation 		<ul style="list-style-type: none"> Manage an online retail brand 111261L5 Formulate marketing, marketing channels and media strategies 111269L6 Formulate after-sales service plans 111262L5 Formulate sales team management strategies 111268L6 Formulate product pricing strategies 111263L5
Crisis Management: <ul style="list-style-type: none"> Develop risk management policies and procedures, establish and maintain fair business practices, protect intellectual property rights and avoid infringements, and strengthen consumer confidence in the organisation Formulate public relations crisis management policies in the relevant areas of work and make appropriate adjustments as necessary 		<ul style="list-style-type: none"> Develop risk management policies and procedures related to intellectual property (IP) 111235L6 Formulate crisis management policies in public relations for relevant areas of work, and monitor the progress of responding to and handling crisis 111227L5

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Job 4	Sales and Marketing Manager / E-commerce Manager	
Major Job Scope		Associated UoC Title and Code
Sales, Marketing & Multi-channel Sales Management: <ul style="list-style-type: none"> Understand the organisation's business and operating policies, and implement its business plan Apply a range of market research techniques to implement market research projects in accordance with the organisation's market research objectives and strategies Implement and monitor the organisation's marketing programmes to promote and improve its retail business Manage the online sales system, and conduct regular monitoring and review to ensure the accuracy and timeliness of the sales system Manage product promotion activities and assist in the development of the organisation's retail business Plan a multi-channel marketing and sales strategy communication plan to assist in the development of the overall retail business Develop advertising strategies to enhance the sales performance of goods and services, and enhance the image of the organisation and brand Monitor and control the project cost, and update the project cost accordingly so that a project can be completed within an approved budget 		<ul style="list-style-type: none"> Implement business plan 111223L4 Implement a market research proposal 111251L4 Implement and monitor marketing activities 111252L4 Manage online sales system 111410L4 Manage goods promotional activities 111253L4 Plan online multi-channel marketing communications 111254L4 Implement advertising strategies 111255L4 Monitor and control the project cost 111417L5
Performance Management: <ul style="list-style-type: none"> Use personnel management skills to lead the sales team to achieve the organisation's set business goals and increase sales Implement a motivating and driving sales team reward scheme to enhance sales performance 		<ul style="list-style-type: none"> Build and lead a sales team 111250L4 Implement sales team incentive plans 111257L4
Crisis Management: <ul style="list-style-type: none"> Promote public relations crisis management policy in the relevant areas of work and ensure that the team understands the relevant policies, principles and procedures of crisis management and public relations 		<ul style="list-style-type: none"> Promote public relations crisis management policy 111226L4

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Job 5	Sales and Marketing Officer / E-Commerce Officer	
Major Job Scope		Associated UoC Title and Code
Sales, Marketing & Multi-channel Sales Management:		
<ul style="list-style-type: none"> Implement the established brand promotion and multi-channel sales management strategies of the organisation to help the organisation establish the desired brand image and strengthen business development Implement advertising and promotional activities to achieve the organisation's sales targets Implement a sales plan to achieve the sales target Manage and record customers' sales activities, as well as corresponding profit and loss calculations and data records 		<ul style="list-style-type: none"> Implement strategies for brand promotion and multi-channel sales management 111242L3 Implement advertising and promotional activities 111243L3 Implement a sales plan 111244L3 Handle customer profile and activity record 111402L3
Performance Management:		
<ul style="list-style-type: none"> Leverage technologies (e.g. artificial intelligence) to enhance creativity to solve problems and innovate to enhance the effectiveness of individuals, teams and organisations 		<ul style="list-style-type: none"> Make use of technology to enhance creativity and efficiency 111249L3
Crisis Management:		
<ul style="list-style-type: none"> Implement public relations crisis management policy in accordance with relevant policies, principles and procedures for crisis management and public relations 		<ul style="list-style-type: none"> Implement public relations crisis management policy 111222L3

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Job 6	Sales and Marketing Assistant / Sales and Marketing Associate / E-Commerce Assistant	
Major Job Scope		Associated UoC Title and Code
Sales, Marketing & Multi-channel Sales Management: <ul style="list-style-type: none"> • Provide support and consulting services to customers in retail stores • Collect information related to retail market research • Produce slides / presentation materials in line with the organisation's brand image, assist in co-ordinating and creating product promotional content, etc., and conduct publicity and promotional activities through appropriate media • Understand customers' purchase needs, provide suitable information to help them choose suitable products, and recommend the organisation's new products and services to the customer 		<ul style="list-style-type: none"> • Provide support and advice to customers 111327L1 • Collect market information 111239L2 • Produce slides / presentation materials and media kits in line with corporate branding 111240L2 • Build up relationship with customers 111329L2
Crisis Management: <ul style="list-style-type: none"> • Manage self-quality properly in order to build a good image of retail practitioner in daily work and reduce the risk of public relations crisis for the organisation 		<ul style="list-style-type: none"> • Self-quality management 111238L1

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Job 7	Digital Marketing Director	
Major Job Scope		Associated UoC Title and Code
<p>Digital Marketing Strategies & Policies:</p> <ul style="list-style-type: none"> • Develop a retail e-business model that complies with regulations and fits the organisation itself to grow the organisation's retail business • Conduct comprehensive analysis and evaluation of various factors (e.g., market environment, industry development trends, past and present marketing performance, organisational operational strategies) to formulate feasible and forward-looking market development objectives • Evaluate effectively the online business and profit potential based on factors such as the organisation's online sales strategy, the commercial website developed and the organisation's own products • Develop a set of marketing, marketing channels and media strategies that best suit the organisation's business needs to enhance the organisation's / brand's awareness and market share • Manage all sales channels for retail brands to build customer engagement, corporate image and increase sales • Formulate effective customer relationship management (CRM) strategies according to corporate mission and objectives, so as to retain existing customers, attract new customers and find potential customers to develop retail business • Adopt appropriate digital and social media marketing tools (e.g. SMS, online forums, social platforms) to promote the organisation, brand, products, etc., so as to increase brand awareness and customer engagement, thereby driving business results and expanding market share 		<ul style="list-style-type: none"> • Develop an e-retail business model 111422L5 • Monitor the retail market trends and formulate market development objectives 111270L6 • Evaluate online business 111420L5 • Formulate marketing, marketing channels and media strategies 111269L6 • Manage an online retail brand 111261L5 • Formulate customer relationship management strategies 111342L6 • Develop digital marketing strategy 111267L5
<p>Performance Management:</p> <ul style="list-style-type: none"> • Use personnel management skills to lead the sales team to achieve the organisation's set business goals and increase sales 		<ul style="list-style-type: none"> • Build and lead a sales team 111250L4
<p>Crisis Management:</p> <ul style="list-style-type: none"> • Develop risk management policies and procedures, establish and maintain fair business practices, protect intellectual property rights and avoid infringements, and strengthen consumer confidence in the organisation • Formulate public relations crisis management policies in the relevant areas of work and make appropriate adjustments as necessary 		<ul style="list-style-type: none"> • Develop risk management policies and procedures related to intellectual property (IP) 111235L6 • Formulate crisis management policies in public relations for relevant areas of work, and monitor the progress of responding to and handling crisis 111227L5

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Job 8	Content Marketing Manager / Digital Marketing Manager	
Major Job Scope		Associated UoC Title and Code
Content Marketing Management: <ul style="list-style-type: none"> Understand the organisation's business and operating policies, and implement its business plan Integrate the Customer Relationship Management strategies of each subcontractor with the organisation to realise the collective benefits Manage the online sales system, and conduct regular monitoring and review to ensure the accuracy and timeliness of the sales system Create digital content or guide agencies to prepare suitable content, manage website data / digital marketing content to achieve business goals Understand and apply the main operational modules of the Customer Relationship Management system 		<ul style="list-style-type: none"> Implement business plan 111223L4 Incorporate and fine-tune the proposals by other organisations such as outsourcing party 111408L4 Manage online sales system 111410L4 Manage the content for website / digital marketing 111256L4 Apply technology to support customer relationship management 111278L5
Performance Management: <ul style="list-style-type: none"> Implement motivating and driving sales team incentive plans to enhance sales performance 		<ul style="list-style-type: none"> Implement sales team incentive plans 111257L4
Crisis Management: <ul style="list-style-type: none"> Promote public relations crisis management policy in the relevant areas of work and ensure that the team understands the relevant policies, principles and procedures of crisis management and public relations Establish a complete social media network crisis response strategy to reduce the damage of the crisis and protect the corporate image and brand from infringement Establish a cyber crisis monitoring system and a comprehensive cyber crisis response strategy 		<ul style="list-style-type: none"> Promote public relations crisis management policy 111226L4 Manage crisis of social media public relations 111274L4 Manage crisis of internet public relations 111275L4

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Job 9	Content Marketing Executive / Digital Marketing Officer / Digital Marketing Analyst	
Major Job Scope		Associated UoC Title and Code
Content Marketing Management: <ul style="list-style-type: none"> • Apply the customer behaviour and preference analysis to understand the customer needs, and improve user experience, website usability; and increase sales success rate through digital content created internally or by agents, so as to provide a basis for network marketing strategies and website operation and management • Manage the organisation's online branded products to retain existing customers, attract new customers and generate potential customers • Manage the organisation's online shopping system to ensure that the current system functions and operating procedures are in line with the organisation's operational policies and user needs • Utilise the knowledge of retail inventory management and computer networks to properly manage the online inventory of the organisation, so as to assist in the organisation's retail business development • Manage and record customers' sales activities, as well as corresponding profit and loss calculations and data records • Analyse data and submit reports, draw conclusions for analysis objectives (e.g., evaluate a product, an operational event), report marketing problems and solutions, and serve as a reference for decision-making 		<ul style="list-style-type: none"> • Analyse customers' purchase patterns 111395L5 • Manage online brands 111404L3 • Manage online shopping 111405L3 • Manage online inventory 111406L3 • Handle customer profile and activity record 111402L3 • Analyse website data and prepare report 111394L4
Performance Management: <ul style="list-style-type: none"> • Leverage technologies (e.g. artificial intelligence) to enhance creativity to solve problems and innovate to enhance the effectiveness of individuals, teams and organisations 		<ul style="list-style-type: none"> • Make use of technology to enhance creativity and efficiency 111249L3
Crisis Management: <ul style="list-style-type: none"> • Implement public relations crisis management policy in accordance with relevant policies, principles and procedures for crisis management and public relations • Manage self-quality properly in order to build a good image of retail practitioner in daily work and reduce the risk of public relations crisis for the organisation 		<ul style="list-style-type: none"> • Implement public relations crisis management policy 111222L3 • Self-quality management 111238L1

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Job 10	Digital Marketing Assistant / Assistant Digital Marketing Analyst	
Major Job Scope		Associated UoC Title and Code
Content Marketing Management: <ul style="list-style-type: none"> • Provide account services for various service plans offered to different customer segments via product / service provision channels • Conduct effective online sales in accordance with the established online sales procedures and product promotion strategies of the organisation, so as to assist the organisation's retail business development • Use website traffic analysis tools to collect relevant data for statistics and analysis • Collect website traffic in different periods and perform statistics and comparative analysis on relevant data • Collect visitor data for segmentation, and perform statistical and comparative analysis • Evaluate the effectiveness of different search engines through the analysis of search engines, keywords, etc • Analyse the category, destination, price, and channel of the order, and provide a basis for network marketing strategy and website operation and management • Maintain good online customer relationship and improve online sales business 		<ul style="list-style-type: none"> • Undertake general administrative work for accounts services 111397L2 • Conduct online sales 111400L2 • Perform website traffic analytics 111389L3 • Perform website traffic time analytics 111390L3 • Perform website visitor analytics 111391L3 • Perform search engine analytics 111392L3 • Perform customer order analytics 111393L3 • Retain online customers 111399L2
Crisis Management: <ul style="list-style-type: none"> • Manage self-quality properly in order to build a good image of retail practitioner in daily work and reduce the risk of public relations crisis for the organisation 		<ul style="list-style-type: none"> • Self-quality management 111238L1

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Core Functional Area: Customer Relationship Management

Job 11	Customer Relationship Management Director	
Major Job Scope		Associated UoC Title and Code
<p>Customer Relationship Management Strategies and Policies:</p> <ul style="list-style-type: none"> • Comply with relevant business laws and build a good organisational image in the general public and customers • Formulate effective customer relationship management (CRM) strategies according to corporate mission and objectives, so as to retain existing customers, attract new customers and find potential customers to develop retail business • Provide satisfactory service to customers, improve the relationship with customers, and cultivate customer loyalty • Formulate customer service scheme to provide quality service according to the operational policy of the organisation and the market trend, so as to enhance the corporate image and business • Establish and implement a set of customer service performance criteria according to the customer relationship strategies of the organisation in order to enhance its image and retail business • Develop a set of after-sales service plans that comply with regulations and are best suited for the organisation to help grow the retail business • Develop effective customer relationship management strategy to review and integrate relevant information and data for analysis and set the long-term development direction for the corporate • Establish and maintain business partner relationship to reduce uncertainty of cooperation and enhance customer satisfaction 		<ul style="list-style-type: none"> • Build an organisational image 111233L6 • Formulate customer relationship management strategies 111342L6 • Maintain and improve customer relationship strategy 111276L5 • Formulate customer service scheme 111341L5 • Establish customer service performance criteria 111339L5 • Formulate after-sales service plans 111262L5 • Analyse, plan and optimise Customer Relationship Management system 111279L5 • Manage business partner relationship 111280L6
<p>Crisis Management:</p> <ul style="list-style-type: none"> • Develop risk management policies and procedures, establish and maintain fair business practices, protect intellectual property rights and avoid infringements, and strengthen consumer confidence in the organisation • Formulate public relations crisis management policies in the relevant areas of work and make appropriate adjustments as necessary 		<ul style="list-style-type: none"> • Develop risk management policies and procedures related to intellectual property (IP) 111235L6 • Formulate crisis management policies in public relations for relevant areas of work, and monitor the progress of responding to and handling crisis 111227L5

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Job 12	Customer Relationship Management Manager	
Major Job Scope		Associated UoC Title and Code
Customer Relationship Management:		
<ul style="list-style-type: none"> • Ensure that customers are satisfied with the products / services provided by the organisation; and maintain customer satisfaction level by reviewing the products and services regularly • Assess the customer service scheme and performance indicators to improve customer service, develop corporate business and enhance corporate image • Provide more attractive measures to existing customers and explore their new needs or identify potential customers • Understand and apply the main operational modules of the Customer Relationship Management System 		<ul style="list-style-type: none"> • Review products and services to maintain customer satisfaction level 111335L4 • Review customer service scheme 111336L4 • Explore potential requirements of customers 111277L5 • Apply technology to support customer relationship management 111278L5
Crisis Management:		
<ul style="list-style-type: none"> • Promote public relations crisis management policy in the relevant areas of work and ensure that the team understands the relevant policies, principles and procedures of crisis management and public relations 		<ul style="list-style-type: none"> • Promote public relations crisis management policy 111226L4

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Job 13	Customer Relationship Management Officer / Executive	
Major Job Scope		Associated UoC Title and Code
Customer Relationship Management:		
<ul style="list-style-type: none"> Implement customer service management and provide quality services to satisfy customer needs and develop the retail business of the organisation Master consumer behaviour psychology and apply general techniques of promoting products / services to facilitate transaction Handle customer complaints effectively according to the procedures and criteria of the organisation, and follow up to customers' satisfaction Handle complaints, resolve issues or report to customers Conduct targeted surveys to reduce churn 		<ul style="list-style-type: none"> Implement quality customer service scheme 111331L3 Master consumer psychology and behaviour 111332L3 Handle customers' complaints 111333L3 Deal with customer complaints 111272L3 Investigate customer satisfaction 111273L3
Performance Management:		
<ul style="list-style-type: none"> Leverage technologies (e.g. artificial intelligence) to enhance creativity to solve problems and innovate to enhance the effectiveness of individuals, teams and organisations 		<ul style="list-style-type: none"> Make use of technology to enhance creativity and efficiency 111249L3
Crisis Management:		
<ul style="list-style-type: none"> Implement public relations crisis management policy in accordance with relevant policies, principles and procedures for crisis management and public relations 		<ul style="list-style-type: none"> Implement public relations crisis management policy 111222L3

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Job 14	Customer Relationship Management Assistant	
Major Job Scope		Associated UoC Title and Code
Customer Relationship Management: <ul style="list-style-type: none"> Understand the basic information of the organisation's products and be able to comprehensively convey them to customers Provide support and consulting services to customers Use fundamental communication skills to serve customers and understand their needs to facilitate transactions Understand customers' purchase needs, provide suitable information to help them choose suitable products, and recommend the organisation's new products and services to the customer Use good communication and interpersonal skills to foster interaction with the customers, so as to gain their trust and commitment, and assist in the organisation's retail business development Introduce / promote the organisation's loyalty programme to customers, such as members' benefits of advantages, in order to enhance customer loyalty to the organisation, and exhibit the organisation's professional service attitude towards customers and its future development policy, etc 		<ul style="list-style-type: none"> Provide product information 111271L2 Provide support and advice to customers 111327L1 Serve customers 111328L1 Build up relationship with customers 111329L2 Use good communication skills to facilitate transactions 111330L2 Promote loyalty programmes to customers 111241L2
Crisis Management: <ul style="list-style-type: none"> Manage self-quality properly in order to build a good image of retail practitioner in daily work and reduce the risk of public relations crisis for the organisation 		<ul style="list-style-type: none"> Self-quality management 111238L1

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Core Functional Area: Merchandising / E-commerce Merchandising

Job 15	Head of Merchandising / Merchandising Director / Merchandising Director (E-Commerce)	
Major Job Scope		Associated UoC Title and Code
Merchandising / E-commerce Sourcing Strategies and Policies: <ul style="list-style-type: none"> Supervise and manage international purchasing activities by their broad international horizons and profound expertise in purchasing in order to promote the development of the retail business of the organisation Formulate a purchasing strategy to promote the retail business development and reduce excess inventory so as to achieve maximum investment return Monitor and evaluate suppliers' performance and review the cooperative relationship with them Formulate a competitive product pricing strategies in order to develop the retail business and to increase competitiveness of the organisation Understand the local business laws and regulations, strictly follow and apply them in daily operation and management of the organisation in order to protect the benefit of the organisation 		<ul style="list-style-type: none"> Manage international purchasing 111295L6 Formulate purchasing strategy 111296L6 Plan a purchasing system 111292L5 Formulate product pricing strategies 111263L5 Comply with business laws 111221L3
Data Analysis: <ul style="list-style-type: none"> Analyse and assess suppliers' information and manage relationships with suppliers Master the technology of business intelligence and analysis, use database, data mining, online analysis and other techniques to analyse a large amount of commercial data obtained to support business decision-making 		<ul style="list-style-type: none"> Manage relationship with suppliers 111290L5 Analyse business data 111396L5
Crisis Management: <ul style="list-style-type: none"> Develop risk management policies and procedures, establish and maintain fair business practices, protect intellectual property rights and avoid infringements, and strengthen consumer confidence in the organisation Formulate public relations crisis management policies in the relevant areas of work and make appropriate adjustments as necessary 		<ul style="list-style-type: none"> Develop risk management policies and procedures related to intellectual property (IP) 111235L6 Formulate crisis management policies in public relations for relevant areas of work, and monitor the progress of responding to and handling crisis 111227L5

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Job 16	Merchandising Manager / Merchandising Manager (E-Commerce) / Category Manager / Brand Manager	
Major Job Scope		Associated UoC Title and Code
Policy Management: <ul style="list-style-type: none"> Understand the local business laws and regulations, strictly follow and apply them in daily operation and management of the organisation in order to protect the benefit of the organisation Understand the organisation's business and operating policies, and implement its business plan Assess the effectiveness of the loss prevention policies of the organisation, and put forward recommendations for improvement Manage the financial plan, compile the budget and control the expenditure, so as to make the organisation's financial management more effective 		<ul style="list-style-type: none"> Comply with business laws 111221L3 Implement business plan 111223L4 Audit loss prevention policies 111224L4 Manage budget and financial plan 111225L4
Data Analysis: <ul style="list-style-type: none"> Apply the customer behaviour and preference analysis to understand the customer needs, supervise and improve user experience, website usability, sales success rate; and provide a basis for network marketing strategy, website operation management, merchandising, etc 		<ul style="list-style-type: none"> Analyse customers' purchase patterns 111395L5
Operations Management: <ul style="list-style-type: none"> Prepare contract terms to protect the benefit of the organisation in buying products or services Negotiate contract with suppliers in order to purchase quality guaranteed goods with the most favourable price and earn higher profits for the organisation 		<ul style="list-style-type: none"> Negotiate a contract 111291L5 Purchase goods 111293L5
Merchandising / E-commerce Merchandising & Supply Chain Management (Merchandising): <ul style="list-style-type: none"> State the problem to the supplier and resolve the problem by negotiation independently when goods have special condition / problem and the supplier is found responsible Introduce appropriate suppliers for products / services of the organisation and establish partnerships with them Import goods for retail business, including product procurement, inventory methods, and product marketing 		<ul style="list-style-type: none"> Handle problems with suppliers 111287L4 Establish partnerships with suppliers 111288L4 Import goods 111289L4
Crisis Management: <ul style="list-style-type: none"> Promote public relations crisis management policy in the relevant areas of work and ensure that the team understands the relevant policies, principles and procedures of crisis management and public relations 		<ul style="list-style-type: none"> Promote public relations crisis management policy 111226L4

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Job 17	Merchandiser / Merchandising Officer / Merchandiser (E-Commerce) / Merchandising Officer (E-Commerce)	
Major Job Scope		Associated UoC Title and Code
Merchandising / E-commerce Merchandising & Supply Chain Management (Merchandising): <ul style="list-style-type: none"> Choose suitable suppliers in order to purchase suitable goods in right quantities from them according to established purchasing procedures of the organisation and limits of authority of the relevant post Master different procedures and requirements for the import and export of goods (e.g. national laws, corporate procedures, customs procedures) to complete the import and export of goods Introduce to employees of different positions the detailed information and characteristics of the product purchased by the organisation, so that they can sell it to customers more successfully in their respective working area Understand the needs of the organisation for the purchase of goods and be able to purchase good quality goods at the best price Implement quality control of goods to ensure that the quality of incoming and outgoing goods is up to standard 		<ul style="list-style-type: none"> Implement the purchase 111283L3 Implement the import and export of goods 111302L3 Introduce products 111284L3 Buy goods 111285L3 Implement quality control of goods 111286L3
Data Analysis: <ul style="list-style-type: none"> Analyse the category, destination, price, and channel of the order, and provide a basis for network marketing strategy, website operation management, merchandising, etc 		<ul style="list-style-type: none"> Perform customer order analytics 111393L3
Crisis Management: <ul style="list-style-type: none"> Implement public relations crisis management policy in accordance with relevant policies, principles and procedures for crisis management and public relations 		<ul style="list-style-type: none"> Implement public relations crisis management policy 111222L3

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Job 18	Merchandise Associate / Merchandising Assistant / Merchandising Assistant (E-Commerce)	
Major Job Scope		Associated UoC Title and Code
Merchandising / E-commerce Merchandising & Supply Chain Management (Merchandising): <ul style="list-style-type: none"> • Handle trade documents to enable smooth transaction of goods • Complete the procedures for receiving and delivering goods properly • Handle the payments to suppliers and creditors, including local or international suppliers, according to established payment procedures of the organisation, and the payment amount should not exceed the job authority • Handle commonly-used documents for daily shipments • Receive and record goods in accordance with the organisation's procedures under predictable and regular circumstances 		<ul style="list-style-type: none"> • Handle trade documents 111281L2 • Implement goods delivery 111300L2 • Handle payments for purchases 111282L2 • Handle commonly-used shipping documents 111297L1 • Receive goods for storage 111298L1
Crisis Management: <ul style="list-style-type: none"> • Manage self-quality properly in order to build a good image of retail practitioner in daily work and reduce the risk of public relations crisis for the organisation 		<ul style="list-style-type: none"> • Self-quality management 111238L1

Job 19	Visual Merchandising Manager	
Major Job Scope		Associated UoC Title and Code
Visual Merchandising / Visual Merchandising / Merchandising Management: <ul style="list-style-type: none"> • Understand the basic system and content of corporate costs • Use a wide range of product knowledge and marketing techniques to draw up the most appropriate window design plan to help the development of retail business • Monitor and control the project cost, and update the project cost accordingly so that a project can be completed within an approved budget 		<ul style="list-style-type: none"> • Manage corporate costs 111228L5 • Draw up store and window design plans 111367L5 • Monitor and control the project cost 111417L5
Data Analysis: <ul style="list-style-type: none"> • Research and analyse the latest lifestyle trends and design trends; plan, design and implement creative visual merchandising strategies to demonstrate strong communication power, enable the organisation to make use of various online and offline channels to deliver brand messages to customers and increase the success rate of sales 		<ul style="list-style-type: none"> • Research and analyse the latest life trends and design trends; plan, design and implement creative visual merchandising strategies 111294L5
Crisis Management: <ul style="list-style-type: none"> • Promote public relations crisis management policy in the relevant areas of work and ensure that the team understands the relevant policies, principles and procedures of crisis management and public relations 		<ul style="list-style-type: none"> • Promote public relations crisis management policy 111226L4

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Job 20	Visual Merchandiser / Visual Merchandising Supervisor	
Major Job Scope		Associated UoC Title and Code
Store Operation (Merchandising): <ul style="list-style-type: none"> • Display / show commodities properly in retail stores to attract and facilitate customers to buy • Manage store displays according to the design plan and goal so as to cope with the marketing strategies of the organisation and facilitate its retail business development and boost sales • Arrange the exhibition items of the showroom properly so as to support the smooth operation of the exhibitions held by the organisation • Apply product display skills to identify and use materials suitable for window or indoor display, so as to highlight the characteristics of products to meet the sales and promotion target 		<ul style="list-style-type: none"> • Implement commodity display 111357L3 • Manage store displays 111364L4 • Arrange the exhibition items of the showroom 111427L3 • Identify and use display materials 111428L3
Crisis Management: <ul style="list-style-type: none"> • Implement public relations crisis management policy in accordance with relevant policies, principles and procedures for crisis management and public relations 		<ul style="list-style-type: none"> • Implement public relations crisis management policy 111222L3

Job 21	Visual Merchandising Assistant	
Major Job Scope		Associated UoC Title and Code
Store Operation (Merchandising): <ul style="list-style-type: none"> • Implement the organisation's store and window design plan and provide a safe shopping environment for customers • Complete the preparation of the commodity display 		<ul style="list-style-type: none"> • Implement store design plan 111352L3 • Prepare for commodity display 111237L1
Crisis Management: <ul style="list-style-type: none"> • Manage self-quality properly in order to build a good image of retail practitioner in daily work and reduce the risk of public relations crisis for the organisation 		<ul style="list-style-type: none"> • Self-quality management 111238L1

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Core Functional Area: Supply Chain Management

Job 22	Supply Chain Director / Logistics Director	
Major Job Scope		Associated UoC Title and Code
Supply Chain Management Strategies and Policies: <ul style="list-style-type: none"> Identify the process of outsourcing logistics services and monitor the performance of outsourcers/service providers to improve the operational efficiency of the organisation Develop logistics solutions covering cross-border regions (e.g. Pearl River Delta or other countries) to provide more cost-effective logistics services to support the expansion of the organisation's business Establish appropriate supply and distribution chains for the organisation and enable continuous improvement to facilitate the development of the organisation's retail business Lead the team to formulate the logistics management business continuity plans and ensure that the goods can be delivered to the retail points on time Formulate effective inventory management strategies to ensure the accuracy of inventory Formulate inventory control systems to reflect the real inventory situation; and optimise inventory management for an effective retail business management Formulate cross-border warehousing and logistics strategy to maintain efficient and low-cost logistics solutions for the most benefit of the corporate Forecast product sales performance in order to formulate the business planning process and boost the sales 		<ul style="list-style-type: none"> Manage third party logistics services 111325L6 Formulate cross-border logistics solutions 111322L6 Improve the supply and distribution chain 111321L6 Develop logistics management business continuity plans 111320L5 Formulate inventory management strategies 111319L5 Formulate inventory control systems 111315L5 Formulate cross-border warehousing and logistics strategy 111326L6 Forecast product sales performance 111260L5
Crisis Management: <ul style="list-style-type: none"> Formulate risk management plans for different working procedures based on the thorough understanding of the transport procedures Handle logistics crises effectively in order to protect the benefit of the organisation with respect to its long-term development and business management Develop risk management policies and procedures, establish and maintain fair business practices, protect intellectual property rights and avoid infringements, and strengthen consumer confidence in the organisation Formulate public relations crisis management policies in the relevant areas of work and make appropriate adjustments as necessary 		<ul style="list-style-type: none"> Formulate risk management plans 111324L6 Handle logistics crises 111323L6 Develop risk management policies and procedures related to intellectual property (IP) 111235L6 Formulate crisis management policies in public relations for relevant areas of work, and monitor the progress of responding to and handling crisis 111227L5

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Job 23	Supply Chain Manager / Logistics Manager	
	Major Job Scope	Associated UoC Title and Code
	<p>Policy Management:</p> <ul style="list-style-type: none"> Understand the local business laws and regulations, strictly follow and apply them in daily operation and management of the organisation in order to protect the benefit of the organisation Understand the organisation's business and operating policies, and implement its business plan Assess the effectiveness of the loss prevention policies of the organisation, and put forward recommendations for improvement Manage the financial plan, compile the budget and control the expenditure, so as to make the organisation's financial management more effective 	<ul style="list-style-type: none"> Comply with business laws 111221L3 Implement business plan 111223L4 Audit loss prevention policies 111224L4 Manage budget and financial plan 111225L4
	<p>Merchandising & Supply Chain Management (Logistics / Warehouse):</p> <ul style="list-style-type: none"> Perform different forms of e-commerce logistics operations Follow the organisation's operational procedures, business continuity plans and emergency response measures, etc. in order to reduce the losses of the organisation, customers and business partners, and enable the business to resume normal operation Manage inventory to support the overall supply chain operation of the organisation Confirm the supports required for the retail units and arrange appropriate resources to ensure that the goods are delivered to these units 	<ul style="list-style-type: none"> Implement e-commerce logistics operating procedures 111310L4 Implement logistics management business continuity plans 111311L4 Manage inventory 111312L4 Provide logistic support 111313L4
	<p>Operations Management:</p> <ul style="list-style-type: none"> Establish and maintain an overall smooth supply chain for the organisation addressing to the floating demand for various types of goods of different departments / stores of the organisation Take full consideration of the organisation's requirements for warehouse space, plan warehouse space and layout effectively, providing sufficient space for storage of goods and a safe working environment for staff Select appropriate logistics equipment according to daily warehouse operation needs, commodity type, storage method, etc. Manage inventory at various stocking points (including bonded warehouses) properly and complete relevant reporting procedures to support smooth operation of the overall supply chain of the organisation 	<ul style="list-style-type: none"> Establish and maintain a supply chain 111318L5 Optimise warehouse space utilisation and layout planning 111316L5 Manage logistics equipment 111317L5 Manage imported and exported goods for cross-border e-business 111314L4
	<p>Crisis Management:</p> <ul style="list-style-type: none"> Promote public relations crisis management policy in the relevant areas of work and ensure that the team understands the relevant policies, principles and procedures of crisis management and public relations 	<ul style="list-style-type: none"> Promote public relations crisis management policy 111226L4

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Job 24	Supply Chain Officer / Logistics Officer	
Major Job Scope		Associated UoC Title and Code
Merchandising & Supply Chain Management (Logistics / Warehouse): <ul style="list-style-type: none"> • Supervise the delivery of goods (from distribution centres to retail outlets) and handle returns for various reasons during the delivery process • Master, organise and evaluate the organisation's procedures and information of product wholesale, distribution, inventory and transport • Implement logistics safety and health management measures to comply with organisational and regulatory requirements • Monitor the inventory level to ensure there is sufficient inventory to meet the business needs • Implement the organisation's established inventory procedures to ensure that the relevant operational procedures are carried out • Arrange for transport vehicles to be repaired and maintained to ensure they meet safety requirements • Present and analyse inventory information and perform retail inventory management • Perform different forms of e-commerce logistics operations 		<ul style="list-style-type: none"> • Supervise the delivery of goods 111303L3 • Supervise the product distribution process 111304L3 • Implement logistic safety and health management measures 111305L3 • Monitor the inventory level to meet the demand 111306L3 • Implement inventory procedures 111307L3 • Arrange maintenance and repair for transportation means 111308L3 • Perform retail inventory management 111309L3 • Implement e-commerce logistics operating procedures 111310L4
Crisis Management: <ul style="list-style-type: none"> • Implement public relations crisis management policy in accordance with relevant policies, principles and procedures for crisis management and public relations 		<ul style="list-style-type: none"> • Implement public relations crisis management policy 111222L3

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Job 25	Supply Chain Assistant
Major Job Scope	Associated UoC Title and Code
<p>Merchandising & Supply Chain Management (Logistics / Warehouse):</p> <ul style="list-style-type: none"> Handle commonly-used documents for daily shipments Receive and record goods in accordance with the organisation's procedures under predictable and regular circumstances Handle the goods including but not limited to the organisation at distribution centres and pack them properly according to their nature to facilitate future delivery and sales activities Complete the procedures for receiving and delivering goods properly Process returned goods in distribution centres or warehouses and ensure that the return records are correct Arrange for transport vehicles to be repaired and maintained to ensure they meet safety requirements Present and analyse inventory information, and perform retail inventory management 	<ul style="list-style-type: none"> Handle commonly-used shipping documents 111297L1 Receive goods for storage 111298L1 Package goods in distribution centres 111299L1 Implement goods delivery 111300L2 Receive returned goods in distribution centres 111301L2 Arrange maintenance and repair for transportation means 111308L3 Perform retail inventory management 111309L3
<p>Crisis Management:</p> <ul style="list-style-type: none"> Manage self-quality properly in order to build a good image of retail practitioner in daily work and reduce the risk of public relations crisis for the organisation 	<ul style="list-style-type: none"> Self-quality management 111238L1

Job 26	Warehouse Clerk
Major Job Scope	Associated UoC Title and Code
<p>Merchandising & Supply Chain Management (Logistics / Warehouse):</p> <ul style="list-style-type: none"> Handle commonly-used documents for daily shipments Receive and record goods in accordance with the organisation's procedures under predictable and regular circumstances Handle the goods including but not limited to the organisation at distribution centres and pack them properly according to their nature to facilitate future delivery and sales activities Complete the procedures for receiving and delivering goods properly Process returned goods in distribution centres or warehouses and ensure that the return records are correct 	<ul style="list-style-type: none"> Handle commonly-used shipping documents 111297L1 Receive goods for storage 111298L1 Package goods in distribution centres 111299L1 Implement goods delivery 111300L2 Receive returned goods in distribution centres 111301L2
<p>Crisis Management:</p> <ul style="list-style-type: none"> Manage self-quality properly in order to build a good image of retail practitioner in daily work and reduce the risk of public relations crisis for the organisation 	<ul style="list-style-type: none"> Self-quality management 111238L1

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Core Functional Area: Customer Services

Job 27	Customer Service Director	
Major Job Scope		Associated UoC Title and Code
<p>Customer Service Management Strategies and Policies:</p> <ul style="list-style-type: none"> • Develop effective customer service management strategies to meet customer needs, enhance the organisation's image and expand retail business • Provide satisfactory service to customers, improve the relationship with customers, and cultivate customer loyalty • Formulate customer service plans to provide quality services based on business strategies, consumer trends, data analysis and feedback from key stakeholders to enhance the image of the organisation and develop the organisation's retail business • Establish a customer service quality assurance mechanism to ensure that customers receive the best quality customer service and promote a good image of the organisation • Establish and implement an appropriate set of customer service performance standards in line with the organisation's customer relationship management strategy to enhance the organisation's image and retail business 		<ul style="list-style-type: none"> • Formulate customer service management strategies 111343L6 • Maintain and improve customer relationship strategy 111276L5 • Formulate customer service scheme 111341L5 • Establish quality guarantee for customer satisfaction 111340L5 • Establish customer service performance criteria 111339L5
<p>Crisis Management:</p> <ul style="list-style-type: none"> • Develop a set of risk management strategies and compliance policies (e.g. privacy policies) in accordance with the organisation's operational goals and strategies for staff to comply with and implement to protect the interests of the organisation • Formulate public relations crisis management policies in the relevant areas of work and make appropriate adjustments as necessary 		<ul style="list-style-type: none"> • Develop risk management strategies 111366L5 • Formulate crisis management policies in public relations for relevant areas of work, and monitor the progress of responding to and handling crisis 111227L5

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Job 28	Customer Service Manager	
Major Job Scope		Associated UoC Title and Code
<p>Customer Service Management:</p> <ul style="list-style-type: none"> • Ensure that customers are satisfied with the products / services provided by the organisation; and maintain customer satisfaction level by reviewing the products and services regularly • Assess the customer service scheme and performance indicators effectively according to the strategies and objectives of the organisation so as to improve customer service, develop corporate business and enhance corporate image • Provide more attractive measures to existing customers and explore their new needs or identify potential customers • Act as a customer relationship manager of the organisation, establish and maintain relationships with partners, reduce uncertainties, and improve customer satisfaction • Set up a dedicated team to handle customer feedback, collect and analyse customer feedback and data analysis results, so as to optimise various operational processes, product and service quality • Leverage new technology systems to lead the team to continuously improve customer service quality 		<ul style="list-style-type: none"> • Review products and services to maintain customer satisfaction level 111335L4 • Review customer service scheme 111336L4 • Explore potential requirements of customers 111277L5 • Manage business partner relationship 111280L6 • Lead the team to adapt to the renewal and change of the technology system 111337L4 • Oversee the channels for collecting customer opinions and analyse the opinions 111338L4
<p>Crisis Management:</p> <ul style="list-style-type: none"> • Promote public relations crisis management policy in the relevant areas of work and ensure that the team understands the relevant policies related to customer services and the law, principles and procedures of crisis management and public relations 		<ul style="list-style-type: none"> • Promote public relations crisis management policy 111226L4

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Job 29	Customer Service Officer	
Major Job Scope		Associated UoC Title and Code
Customer Service Management:		
<ul style="list-style-type: none"> Handle customer complaints effectively and follow up to customers' satisfaction Handle complaints, resolve issues or report to customers 		<ul style="list-style-type: none"> Handle customers' complaints 111333L3 Deal with customer complaints 111272L3
Store Operations (General):		
<ul style="list-style-type: none"> Implement customer service management and provide quality services to satisfy customer needs and develop the retail business of the organisation 		<ul style="list-style-type: none"> Implement quality customer service scheme 111331L3
Performance Management:		
<ul style="list-style-type: none"> Manage customer service performance of frontline staff and provide on-the-job training and coaching when necessary 		<ul style="list-style-type: none"> Manage customer service performance of frontline staff 111334L3
Crisis Management:		
<ul style="list-style-type: none"> Implement public relations crisis management policy in accordance with relevant policies, principles and procedures for crisis management and public relations 		<ul style="list-style-type: none"> Implement public relations crisis management policy 111222L3

Job 30	Customer Service Assistant	
Major Job Scope		Associated UoC Title and Code
Customer Service:		
<ul style="list-style-type: none"> Understand the basic information of the organisation's products and be able to comprehensively convey them to customers 		<ul style="list-style-type: none"> Provide product information 111271L2
Store Operations (General):		
<ul style="list-style-type: none"> Provide support and consulting services to customers in retail stores Understand customers' purchase needs, provide suitable information to help them choose suitable products, and recommend the organisation's new products and services to them 		<ul style="list-style-type: none"> Provide support and advice to customers 111327L1 Build up relationship with customers 111329L2
Crisis Management:		
<ul style="list-style-type: none"> Manage self-quality properly in order to build a good image of retail practitioner in daily work and reduce the risk of public relations crisis for the organisation 		<ul style="list-style-type: none"> Self-quality management 111238L1

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Core Functional Area: Store Operations

Job 31	Retail Operation Director	
Major Job Scope		Associated UoC Title and Code
Retail Operations Strategy and Policy: <ul style="list-style-type: none"> Comply with relevant business laws and build a good organisational image in the general public and customers Establish appropriate operations strategies and goals, manuals and systems to ensure smooth operations of daily retail business and achieve the best customer service and business results, taking into account the size and variety of retail outlines, other relevant factors and technology Build and develop a capable frontline sales team to execute sales and customer service to achieve business and service objectives Analyse and evaluate sales team's performance, market and competitors' conditions, etc., and collaborate with other departments to formulate sales team management strategies, manpower planning, operation modes and incentive plans to achieve the organisation's overall goals and deliverables 		<ul style="list-style-type: none"> Build an organisational image 111233L6 Establish the retail sales system 111368L5 Build and lead a sales team 111250L4 Formulate sales team management strategies 111268L6
Data Analytics: <ul style="list-style-type: none"> Analyse market factors and statistics to capture the development trends of the retail market and the industry, and formulate feasible and forward-looking market development objectives 		<ul style="list-style-type: none"> Monitor the retail market trends and formulate market development objectives 111270L6
Crisis Management: <ul style="list-style-type: none"> Develop a set of risk management strategies (including customer-related policies and guidelines, occupational safety and health) in accordance with the organisation's operational goals and strategies for staff to comply with and implement to protect the interests of the organisation Formulate public relations crisis management policies in the relevant areas of work and make appropriate adjustments as necessary 		<ul style="list-style-type: none"> Develop risk management strategies 111366L5 Formulate crisis management policies in public relations for relevant areas of work, and monitor the progress of responding to and handling crisis 111227L5

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Job 32	Area / District Manager	
Major Job Scope		Associated UoC Title and Code
Policy Management: <ul style="list-style-type: none"> Understand the organisation's business and operating policies, and implement its business plan Understand the local business laws and regulations, strictly follow and apply them in daily operation and management of the organisation in order to protect the benefit of the organisation 		<ul style="list-style-type: none"> Implement business plan 111223L4 Comply with business laws 111221L3
Store Operations (General): <ul style="list-style-type: none"> Implement workplace management and maintenance work according to the business strategies, policies, and management codes and/or operations manual of the organisation so as to ensure smooth operation of its retail business Analyse and assess the impact of the termination of franchise on the organisation's operation and terminate the rights according to schedule so as to reduce the impact on daily operation 		<ul style="list-style-type: none"> Manage and maintain workplace 111358L4 Manage the termination of franchise 111359L4
Store Operations (Personnel Management): <ul style="list-style-type: none"> Lead and motivate frontline operations teams to deliver a great customer experience to achieve business plans and financial performance Manage frontline staffing, business goal planning and day-to-day duties, and provide daily operational reports to the organisation to achieve optimal teamwork and financial performance 		<ul style="list-style-type: none"> Manage the retail team 111360L4 Deploy staff 111354L3
Crisis Management: <ul style="list-style-type: none"> Promote public relations crisis management policy in the relevant areas of work and ensure that the team understands the relevant policies, principles and procedures of crisis management and public relations 		<ul style="list-style-type: none"> Promote public relations crisis management policy 111226L4

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Job 33	Shop / Store Manager	
Major Job Scope		Associated UoC Title and Code
Store Operations (General):		
<ul style="list-style-type: none"> Manage financial resources of the store (including staffing, expenses and revenue generated from sales), including controlling costs and expenses, formulating store sales budgets, and effectively managing the daily operations of the store in accordance with the established operating manuals of the organisation Meet customer needs, adjust and implement the organisation's inventory planning, promotion, product display and other operational management directions 		<ul style="list-style-type: none"> Manage the financial resources of the retail store 111362L4 Manage retail store inventory 111363L4
Store Operations (Personnel Management):		
<ul style="list-style-type: none"> Build a highly motivated team to provide the best customer service and experience, and achieve the store's business and financial goals set by the organisation Manage and monitor the subordinate's work performance so as to meet the established performance standards and achieve effective human resources management 		<ul style="list-style-type: none"> Manage the retail team 111360L4 Manage the subordinate's work performance 11365L4
Crisis Management:		
<ul style="list-style-type: none"> Prevent product loss according to related policy and procedures of the organisation so as to safeguard its benefits and improve the product management procedures / system at the store Promote public relations crisis management policy in the relevant areas of work and ensure that the team understands the relevant policies, principles and procedures of crisis management and public relations 		<ul style="list-style-type: none"> Inspect the product loss prevention measures 111361L4 Promote public relations crisis management policy 111226L4

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Job 34	Shop / Store Supervisor	
Major Job Scope		Associated UoC Title and Code
Shop Operations (Cleaning & Maintenance/Repair Management): <ul style="list-style-type: none"> Implement the organisation's established safety guidelines to prevent / reduce the occurrence of accidents Keep the retail stores environment clean and hygienic in order to prevent accidents and the corporate image 		<ul style="list-style-type: none"> Implement work safety guidelines 111350L2 Keep the retail environment clean and tidy 111351L2
Store Operations (General): <ul style="list-style-type: none"> Implement advertising and promotional activities to achieve the organisation's sales targets Implement a sales plan in daily work in order to achieve the sales target Implement customer service management and provide quality services according to the quality customer service scheme, procedures and standards of the organisation so as to satisfy customer needs and develop the retail business Handle customer complaints effectively according to the procedures and criteria of the organisation, and follow up to customers' satisfaction Classify goods after analysis and judgement according to the organisation's goods classifications guidelines and procedures Use the retail sales system to ensure the smooth day-to-day operations of the sales and transactions of goods in the retail stores Display / show commodities properly in retail stores to attract and facilitate customers to buy 		<ul style="list-style-type: none"> Implement advertising and promotional activities 111243L3 Implement a sales plan 111244L3 Implement quality customer service scheme 111331L3 Handle customers' complaints 111333L3 Set up goods classification 111355L3 Use the retail sales system 111356L3 Implement commodity display 111357L3
Crisis Management: <ul style="list-style-type: none"> Implement shop security procedures and arrangements of the organisation so as to avoid goods/properties loss and safeguard the benefits of the organisation Implement public relations crisis management policy in accordance with relevant policies, principles and procedures for crisis management and public relations 		<ul style="list-style-type: none"> Implement shop security procedures 111353L3 Implement public relations crisis management policy 111222L3

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Job 35	Sales Advisor / Sales Associate / Sales Representative	
Major Job Scope		Associated UoC Title and Code
Store Operations (Merchandise Handling):		
<ul style="list-style-type: none"> Complete related work accurately within specified time according to the established codes and procedures for retail sales system clearing of the organisation Ensure sufficient supply of products and smooth daily operation of the stores Process customer orders according to the organisation's established procedures Handle cash, credit cards and other electronic payments accurately and quickly for smooth transactions 		<ul style="list-style-type: none"> Perform retail sales system clearing 111345L2 Replenish shelves 111346L2 Process orders 111348L2 Handle cash and credit card transaction payment 111349L2
Store Operations:		
<ul style="list-style-type: none"> Follow the code of practice for personal hygiene to implement general sterilisation and cleaning 		<ul style="list-style-type: none"> Implement hygiene procedures 111344L1
Information Technology:		
<ul style="list-style-type: none"> Use information equipment/systems, data entry systems and perform basic repair work at the operating site properly 		<ul style="list-style-type: none"> Operate IT equipment / systems for retail business 111398L2
Performance Management:		
<ul style="list-style-type: none"> Assist in building team spirit 		<ul style="list-style-type: none"> Commit to the work of the retail team 111347L2
Crisis Management:		
<ul style="list-style-type: none"> Manage self-quality properly in order to build a good image of retail practitioner in daily work and reduce the risk of public relations crisis for the organisation 		<ul style="list-style-type: none"> Self-quality management 111238L1

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Core Functional Area: Human Resource Management & Development

Job 36	Human Resource Management & Development Director	
Major Job Scope		Associated UoC Title and Code
<p>Human Resource Management and Development Strategies and Policies:</p> <ul style="list-style-type: none"> Comply with relevant business laws and build a good organisational image in the general public and customers Pay close attention to talent trends and changes in the macro environment, and formulate a set of appropriate and effective human resource strategies and policies in line with the overall goals and resources of the organisation to support the development of the organisation's retail business Engage key stakeholders in identifying and addressing any challenges to the behaviour expected in the implementation of the vision, mission, core values or organisational culture, and in establishing improvement plans to align the organisation's vision, mission, core values and behavioural expectations Design human resource operation systems and procedures in response to business and human resource strategies to enable all relevant units and personnel to perform their duties consistently Develop policies and guidelines on the rank/pay scale structure to compensate all levels of staff in a fair and equitable manner, manage payroll matters, reflect relativity within the organisation and promote career development Understand the overall human resource situation of the organisation and the demand for staff in each position, and formulate a plan for recruitment, development and retention of staff to retain high-quality staff with good performance Develop staff training and development programmes to enhance staff skills and knowledge to assist in the development of the organisation's retail business Develop and maintain employee value orientation and employer brand strategy, which will become an integral part of the organisation's talent management, employer brand and goodwill management Design performance management policies, procedures and systems based on the organisation's business needs, strategic direction and philosophy of dealing with people 		<ul style="list-style-type: none"> Build an organisational image 111233L6 Formulate human resources strategy and policies 111388L6 Align the organisation's vision, mission, core values (VMV) and behavioural expectations HRM106918L6 Translate human resource (HR) strategies into operational systems and procedures HRM106913L6 Design job / pay grade structure HRM106969L6 Formulate a staff retention plan 111386L5 Formulate a staff training and development plan 111385L5 Develop employee value proposition and design employer branding strategy HRM106959L6 Design performance management policies, procedures and system HRM107015L6
<p>Crisis Management:</p> <ul style="list-style-type: none"> Assess the key business risks of the organisation as a whole or the HR function to maintain uninterrupted HR support and services Develop a set of risk management strategies in accordance with the organisation's operational goals and strategies for staff to comply with and implement to protect the interests of the organisation Formulate public relations crisis management policies in the relevant areas of work and make appropriate adjustments as necessary 		<ul style="list-style-type: none"> Evaluate organisational or key business risks of human resource (HR) functions HRM107080L6 Develop risk management strategies 111366L5 Formulate crisis management policies in public relations for relevant areas of work, and monitor the progress of responding to and handling crisis 111227L5

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Job 37	Human Resource Management & Development Manager	
Major Job Scope		Associated UoC Title and Code
Policy Management: <ul style="list-style-type: none"> Promote the organisation's vision, mission, core values, and behavioral expectations to all staff to support the implementation of business strategies, policies, and daily business processes Establish and sustain the organisation's culture through effective organisational development strategies and ongoing initiatives 		<ul style="list-style-type: none"> Promote the organisation's vision, mission, core values (VMV) and behavioural expectations HRM106916L5 Organise and execute ongoing programmes that demonstrate the linkage between organisational culture and core values HRM106917L4
Human Resource Management & Development: <ul style="list-style-type: none"> Consider internal relativity and external market benchmark statistics comprehensively, and implement an appropriate admission and approval process Prepare effective work content based on the activities involved and the quality of personnel required for successful completion of the work Handle staff remuneration and benefits effectively in accordance with the organisation's human resource management system and legal requirements Manage the organisation's human resource information system properly and ensure that the system matches the personnel policy and management procedures of the organisation Use good personnel management skills to handle general labour disputes properly Analyse staff training needs and develop appropriate training programmes to improve the quality of staff 		<ul style="list-style-type: none"> Implement the approval process of employment offer HRM106951L5 Compile valid job specifications and descriptions HRM106933L4 Handle staff remuneration and benefits 111384L4 Manage the human resources information system 111381L4 Handle general labour disputes 111383L4 Analyse training needs and develop staff training and development programmes 111382L4
Performance Management: <ul style="list-style-type: none"> Transform the corporate strategy into the systematic method of corporate operation practice could improve team execution capacity and the corporate development Formulate encouraging and motivating sales team incentive plans to enhance sales performance Reach a consensus on the performance requirements at different levels, and make more objective performance appraisal and promotion decisions 		<ul style="list-style-type: none"> Apply methods to improve team execution capacity 111387L5 Formulate sales team incentive plans 111264L5 Conduct calibration of the performance scores distribution, and facilitate development discussion and decision HRM107018L5
Crisis Management: <ul style="list-style-type: none"> Assess and manage key risks that impact business continuity and people risk profiles Promote public relations crisis management policy in the relevant areas of work and ensure that the team understands the relevant policies, principles and procedures of crisis management and public relations 		<ul style="list-style-type: none"> Identify critical risks which affect business development continuity and people risk profile HRM107076L5 Promote public relations crisis management policy 111226L4

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Job 38	Human Resource Management & Development Officer	
Major Job Scope		Associated UoC Title and Code
Human Resource Management and Development (Appointment and Benefits):		
<ul style="list-style-type: none"> • Select the right staff for different roles to support the organisation's retail business • Implement the organisation's compensation and benefits scheme, policies and guidelines • Implement the staff appraisal policy in accordance with the established policies and standards of the organisation 		<ul style="list-style-type: none"> • Recruit and select personnel 111374L3 • Execute legal compliance and related tax treatment HRM106979L4 • Implement staff appraisal policy 111379L3
Human Resource Management and Development (HRM):		
<ul style="list-style-type: none"> • Handle employee complaints appropriately to avoid negative impact on the organisation's retail business • Implement human resources policies • Promote and enforce equality policies 		<ul style="list-style-type: none"> • Handle staff complaints 111375L3 • Implement human resources policies 111377L3 • Promote equality policy 111378L3
Human Resource Management & Development (Training):		
<ul style="list-style-type: none"> • Arrange for staff in need of training to receive appropriate systematic on-the-job training / fragmented learning to continuously enhance their professional performance 		<ul style="list-style-type: none"> • Provide in-service training 111376L3
Crisis Management:		
<ul style="list-style-type: none"> • Communicate with all employees to keep the organisation's business operations in compliance with all relevant employment regulations and regulatory requirements • Implement public relations crisis management policy in accordance with relevant policies, principles and procedures for crisis management and public relations 		<ul style="list-style-type: none"> • Examine employee understanding and obtain commitment to human resource (HR) compliance HRM107057L4 • Implement public relations crisis management policy 111222L3

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Job 39	Human Resource Management & Development Associate	
Major Job Scope		Associated UoC Title and Code
Human Resource Management & Development:		
<ul style="list-style-type: none"> Record, verify and process staff attendance information accurately as required by law Handle staff records properly in accordance with the established procedures and relevant legal requirements Comply with the general requirements of labour laws in daily work to protect the interests of both the employer and employees Comply with regulatory requirements and provide comprehensive employment security and benefits to all employees Implement administrative and logistical arrangements for various staff learning and development courses 		<ul style="list-style-type: none"> Record and verify staff attendance information 111371L2 Handle staff records 111372L2 Apply general labour regulations 111373L2 Possess updated knowledge of employment related ordinances HRM107054L3 Make necessary arrangements for learning and development (L&D) programmes HRM107012L3
Crisis Management:		
<ul style="list-style-type: none"> Manage self-quality properly in order to build a good image of retail practitioner in daily work and reduce the risk of public relations crisis for the organisation 		<ul style="list-style-type: none"> Self-quality management 111238L1

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Core Functional Area: Data Analytics

Job 40	Principal Data Scientist	
Major Job Scope		Associated UoC Title and Code
Data Science Strategies and Policies:		
<ul style="list-style-type: none"> Lead innovation within the organisation and define how additional business value could be created through the utilisation of the organisation's data assets and analytics Develop, plan, and manage the overall policies and goals of the organisation's data science function Ensure that all key data management procedures and processes comply with relevant regulatory requirements 		<ul style="list-style-type: none"> Formulate business strategies and policies 111201L6 Review, design and re-engineer business processes to form a new business architecture 111125L6 Establish a business case for an IT investment ITSWG617A Identify and evaluate the data sources to fulfil the data requirements in support of business objectives 111136L6 Define data governance policies and architecture principles 111123L6 Develop application integration architecture 111124L6 Define data classification policy for enterprise 111133L6 Define and establish the data architectures 111138L6 Review and comply with organisational policies and procedures, relevant laws and regulatory requirements 111205L6 Review the ethical and social issues for IT applications 111208L6 Develop compliance framework for the meeting of ethical and regulatory requirements related to enterprise data 111132L6
Application Development for Data Science:		
<ul style="list-style-type: none"> Evaluate and select the appropriate tools, techniques, staffing, and methodologies to extract and manage data for application development 		<ul style="list-style-type: none"> Review the emerging technologies and cross-functional strategies 111207L6 Understand the use of data concepts and topologies 111135L6 Appraise and select the appropriate data management tools and services to manage the target data based on different requirements 111141L6 Appraise, select and integrate the appropriate data analytics and/or modelling solutions to perform the data analytics process based on different requirements 111144L6 Keep awareness towards autonomous decision making process on the impact of business 111153L6 Plan and develop the customised visualisation tools based on the business requirements 111150L6
Crisis Management:		
<ul style="list-style-type: none"> Develop a set of risk management strategies in accordance with the organisation's operational goals and strategies for staff to comply with and implement to protect the interests of the organisation Formulate public relations crisis management policies in the relevant areas of work and make appropriate adjustments as necessary 		<ul style="list-style-type: none"> Develop risk management strategies 111366L5 Formulate crisis management policies in public relations for relevant areas of work, and monitor the progress of responding to and handling crisis 111227L5

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Job 41	Data Scientist	
Major Job Scope		Associated UoC Title and Code
Data Collection, Analysis, and Management Tool Development:		
<ul style="list-style-type: none"> Develop and implement data analysis, data collection systems, and other strategies that optimise statistical efficiency and quality 		<ul style="list-style-type: none"> Plan and develop the analytics and modeling tools 111147L6 Design and develop data management tools and services to manage the target data based on different requirements 111142L6 Perform the data management processes using the identified tools 111143L6 Perform model training, testing and validation in evaluating and optimising the model based on various metrics 111146L6
Data Acquisition & Database Management:		
<ul style="list-style-type: none"> Acquire data from primary or secondary data sources and maintain databases/data systems Examine and identify database structural necessities by evaluating client operations, applications, and programming Assess database implementation procedures to ensure compliance with internal and external regulations Prepare accurate database design and architecture reports for management and executive teams 		<ul style="list-style-type: none"> Manage and implement different data acquisition options for the identified internal or external sources 111137L6 Conduct and review pre-processing and transformation of the data with data quality management 111140L6 Check usability of a target data architecture 111139L6 Build the analytics solutions/models to support better business decisions and improve performance 111145L6 Perform and evaluate the autonomous decision making process 111154L6 Understand the use of data visualisation and the factors in selecting and using various data visualisation tools 111148L6 Enforce enterprise data standards for business needs 111134L6 Appraise the various data visualisation tools and select the appropriate tools according to user requirements 111149L6 Develop clear and actionable recommendations based on the analysis results to the stakeholders for decision support 111152L6
Crisis Management:		
<ul style="list-style-type: none"> Promote public relations crisis management policy in the relevant areas of work and ensure that the team understands the relevant policies, principles and procedures of crisis management and public relations 		<ul style="list-style-type: none"> Promote public relations crisis management policy 111226L4

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Job 42	Junior Data Scientist	
Major Job Scope		Associated UoC Title and Code
Development and Maintenance of Database Systems: <ul style="list-style-type: none"> Support the database system development with all aspects of software design and coding Monitor the technical performance of database systems Conduct data discovery activities, perform cause analysis, and make recommendations for remediation of data quality issues 		<ul style="list-style-type: none"> Understand and utilise the preset data visualisation dashboard/displays tools 111151L4 Perform script programming 107936L4 Verify and validate that the deployed / migrated software and the existing software are functioning properly 111159L4 Perform system testing against user, technical and hosting requirements 111160L4
Crisis Management: <ul style="list-style-type: none"> Implement public relations crisis management policy in accordance with relevant policies, principles and procedures for crisis management and public relations 		<ul style="list-style-type: none"> Implement public relations crisis management policy 111222L3

Note: The UoC codes prefixed with “HRM” indicate that they are sourced from the Specification of Competency Standards (SCS) for the Human Resource Management sector. The UoCs prefixed with “I” and associated with the three data analytics-related positions are derived from the SCS for the Information and Communications Technology (ICT) industry.

Core Functional Area: Information Technology

Job 43	Information Technology Director / Chief Digital Transformation Officer / General Manager, Digital Transformation	
Major Job Scope		Associated UoC Title and Code
Online Retail Business System Management: <ul style="list-style-type: none"> Evaluate effectively the online business and profit potential based on factors (e.g. the organisation's online sales strategy, the commercial website developed and the organisation's own products) Manage IT projects and provide planning, consultation, support, management and implementation of related IT projects to the organisation's employees and clients to ensure that the organisation's business goals and objectives are achieved Establish an online retail platform that meets the operational needs of the organisation and provides high return on investment Manage organisational resources and business processes (e.g. reducing data entry and storage) to improve customer satisfaction and complete tasks better and more timely 		<ul style="list-style-type: none"> Evaluate online business 111420L5 Manage IT projects 111424L6 Build an online retail platform 111425L6 Manage an enterprise resource plan 111426L6
Software Architecture: <ul style="list-style-type: none"> Define, review and validate architecture principles for the network resources of an organisation to meet its business application objectives based on geographic and physical constraints Define data management policies, architectural principles and scope of data assets for the establishment of data architectures to support the development of information systems Develop a technology architecture baseline to satisfy business requirements of particular IT solution in an organisation Review, re-engineer and design business processes for optimal achievements of the agreed business goals and strategic drivers via adoption of new technologies Manage technology architecture life cycle (can also be described as performing change management of the technology architecture) by analysing current and future needs of the organisation and technology trends Define, manage and maintain resources to upkeep application in integration architecture in the most current status Define metrics and methodologies for evaluating the business performance under the existing and new technology architectures 		<ul style="list-style-type: none"> Define, review and validate network architecture principles ITSWAR509A Define data management policies and architecture principles ITSWAR608A Define, review and document a technology architecture baseline ITSWAR614A Review, design and re-engineer business processes to form a new business architecture ITSWAR607A Manage technology architecture life cycle ITSWAR616A Manage application integration architecture life cycle ITSWAR517A Define metrics and methodologies to measure business performance of applying new technologies ITSWAR505A
Crisis Management: <ul style="list-style-type: none"> Comply with regulatory requirements in IT field, develop a set of risk management strategies in accordance with the organisation's operational goals and strategies for staff to comply with and implement to protect the interests of the organisation 		<ul style="list-style-type: none"> Develop risk management strategies 111366L5 Formulate crisis management policies in public relations for relevant areas of work, and monitor the progress of responding to and handling crisis 111227L5

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<ul style="list-style-type: none"> Formulate public relations crisis management policies in the relevant areas of work and make appropriate adjustments as necessary 	
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Job 44	Application Development Manager	
Major Job Scope		Associated UoC Title and Code
Policy Management: <ul style="list-style-type: none"> Formulate relevant tactical plans for an organisation based on the approved IT strategies and policies and for managing their implementation Select appropriate information technologies for the business of an organisation and/or an external client Execute, monitor and review the approved IT strategies and plans of the organisation Evaluate the effectiveness of the execution of the approved IT strategies and plans of the organisation Monitor and control the project cost, and update the project cost accordingly so that a project can be completed within an approved budget 		<ul style="list-style-type: none"> Formulate relevant tactical plan based on the approved IT strategies and policies ITWSM604A Select appropriate information technologies for business purposes ITWSM613A Execute, monitor and review the approved IT strategies and plans ITWSM605A Evaluate the effectiveness of the execution of the approved IT plans ITWSM606A Monitor and control the project cost 111417L5
Software Design, Development, and Maintenance: <ul style="list-style-type: none"> Formulate, analyse, evaluate and propose a high level design (HLD) of the software based on its software requirements specification and architecture design Perform risk assessment on software deployment and migration before drawing up of the deployment or migration plan and contingency plan Define a software deployment / migration plan taking into account the business operations (including contingency plans). Identify the stakeholders, limitations, constraints, risks and technical as well as business requirements for software releases and control Perform risk assessment on software releases and control with reference to standard methodologies and organisation's guidelines Define software releases and control plans (including contingency plans) Define software decommissioning policy and plan taking into account the impact on business operations in preparation for the decommissioning of software 		<ul style="list-style-type: none"> Propose a high level design (HLD) of the software ITSWDM602A Perform risk assessment on software deployment and migration ITSWDM610A Define a software deployment / migration plan ITSWDM611A Identify the requirements for software releases and control ITSWDM606A Perform risk assessment on software releases and control ITSWDM607A Define software releases and control plan ITSWDM608A Define software decommissioning policy and plan ITSWDM613A
IT Advisory / Support & Resource Management: <ul style="list-style-type: none"> Understand System Development Life Chain (SDLC) and software development process in order to perform IT consulting within an organisation or for an external client to meet its business goals and objectives Allocate and prioritize IT and related resources for optimizing the return of investments 		<ul style="list-style-type: none"> Understand Systems Development Life Cycle (SDLC) and software development process ITWGS619A Allocate and prioritize IT and related resources ITWGS614A
Crisis Management:		

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<ul style="list-style-type: none"> • Develop risk mitigation strategies and plans related to information technology (IT) (e.g. software development, maintenance and service provision) to achieve business objectives and goals • Review risk factors related to IT (e.g. software development, maintenance, and service provision), and execute and monitor risk mitigation plans in the context of risk management within an organisation • Promote public relations crisis management policy in the relevant areas of work and ensure that the team understands the relevant policies, principles and procedures of crisis management and public relations 	<ul style="list-style-type: none"> • Develop risk mitigation strategies and plans related to IT ITSWG610A • Review risk factors related to IT, and execute and monitor risk mitigation plans ITSWG611A • Promote public relations crisis management policy 111226L4
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Job 45	System Analyst / Analyst Programmer	
Major Job Scope		Associated UoC Title and Code
Software Design, Development, and Maintenance: <ul style="list-style-type: none"> Communicate (oral and written) general business and technical information related to software products and software services with team members and clients effectively Perform testing activities according to the corresponding test plans which may involve the development of software simulators to facilitate different levels of testing Report discrepancies between software and its related documents after conducting testing activities Locate and fix defects in a programme with appropriate debugging tools Verify and validate that the deployed/migrated software and the existing software are functioning properly Identify components (including hardware, software, account and credential information) that need to be retained, removed or archived Verify and validate that the remaining software are functioning properly to ensure that the decommissioning does not affect the existing systems 		<ul style="list-style-type: none"> Communicate (oral and written) information with team members and clients ITSWG402A Perform testing activities to facilitate different levels of testing ITSWDM401A Report discrepancies between software and its related document ITSWDM402A Debug a programme ITSWDM403A Verify and validate that the deployed / migrated software and the existing software are functioning properly ITSWDM405A Identify components that need to be managed in software decommissioning ITSWDM406A Verify and validate that the remaining software are functioning properly ITSWDM407A
Crisis Management: <ul style="list-style-type: none"> Implement public relations crisis management policy in accordance with relevant policies, principles and procedures for crisis management and public relations 		<ul style="list-style-type: none"> Implement public relations crisis management policy 111222L3

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Job 46	Website Designer	
Major Job Scope		Associated UoC Title and Code
Software Design, Development, and Maintenance:		
<ul style="list-style-type: none"> Perform inspection, walkthrough and review for the programme code and software documents according to the Quality Assurance (QA) policies Develop programme modules of the software based on its design documents using specified programming languages following the organisation's coding standards or by adopting certain international coding standards Identify extra functional requirements of the existing software to address the required changes in the context of software maintenance within an organisation or for a client 		<ul style="list-style-type: none"> Perform inspection for the programme code and software documents ITSWDM506A Develop programme modules of the software based on its design documents ITSWDM504A Identify extra functional requirements of an existing software ITSWDM508A
Operations & Support:		
<ul style="list-style-type: none"> Plan and develop an online business website suitable for use by the organisation to expand the organisation's retail business Apply the service functions of mobile payments in the process of website design and development Schedule, organise, monitor, control and report the system operations of non-routine nature or beyond the coverage of existing procedure 		<ul style="list-style-type: none"> Plan and develop an online business website 111419L5 Master mobile payment services 111416L4 Monitor and control the system operation services ITSWOS304A
Crisis Management:		
<ul style="list-style-type: none"> Implement public relations crisis management policy in accordance with relevant policies, principles and procedures for crisis management and public relations 		<ul style="list-style-type: none"> Implement public relations crisis management policy 111222L3

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Job 47	Information Technology Manager	
Major Job Scope		Associated UoC Title and Code
Online Retail Business System Management: <ul style="list-style-type: none"> Identify the IT equipment required for daily operation of the retail store and seek approval from the management for purchase of additional equipment to assist in business development Develop a plan for the deployment, installation, configuration and testing of IT equipment/systems at the business premises Adopt mobile technology to improve sales service to help grow the organisation's overall retail business Implement the e-retail business model and ensure smooth operation to assist in the development of the organisation's retail business Detect the risks arising from e-commerce in a timely and accurate manner and take appropriate measures Integrate the customer relationship management strategies of each subcontractor with the organisation to realise the collective benefits Provide data operation and management services to the organisation or customers in accordance with a series of work instructions, procedures and service requirements of the organisation Develop, design, establish, develop and review the services of the system support service process, and provide support resources and appropriate technology to serve the projects Introduce new technologies and products for retail business 		<ul style="list-style-type: none"> Set up IT equipment needed for retail operations 111411L4 Deploy information technology equipment / systems for retail operations 111412L4 Use mobile technologies to improve sales service 111413L4 Implement e-retail business model 111414L4 Manage online commercial risks 111415L4 Incorporate and fine-tune the proposals by other organisations such as outsourcing party 111408L4 Deliver the database operations services 111409L4 Establish and maintain system support services process 111418L5 Use new technologies to conduct retail business 111421L5
Software Architecture: <ul style="list-style-type: none"> Investigate, evaluate, adopt, and make improvements to the relevant architecture development initiatives, including technology architecture designs undertaken by the IT industry Evaluate, perform trade-offs and recommend application software architecture models and patterns for an organisation or for solving existing problems related to software architecture in an organisation Develop and recommend a network technology architecture model that is applicable to the needs of various stakeholders in an organisation Define and maintain the lifecycle management policy for the adopted embedded software architecture to support the current and future needs of the organisation Ensure that the network architecture is capable of meeting current and future needs of an organisation 		<ul style="list-style-type: none"> Review and make improvements to the relevant architecture development initiatives ITSWAR502A Develop application software architecture models ITSWAR519A Develop a network technology architecture model ITSWAR510A Exercise lifecycle management on the adopted embedded software architecture ITSWAR623A Perform lifecycle management of the network architecture ITSWAR514A
Crisis Management: <ul style="list-style-type: none"> Promote public relations crisis management policy in the relevant areas of work and ensure that the team understands the relevant policies, principles and procedures of crisis management and public relations 		<ul style="list-style-type: none"> Promote public relations crisis management policy 111226L4

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Job 48	Data Storage & IT Infrastructure Specialist / IT Officer	
Major Job Scope		Associated UoC Title and Code
Software Architecture: <ul style="list-style-type: none"> Evaluate and define requirements for any necessary application monitoring and audit functions, and implement these functions on the adopted application integration architecture Demonstrate clear understanding of the key characteristics of various application software architecture models for evaluating the feasibility of adopting those models to the software designed for an organisation 		<ul style="list-style-type: none"> Ensure operable application integration architecture is in place ITSWAR516A Understand the key characteristics of various application software architecture models ITSWAR518A
Software Design, Development, and Maintenance: <ul style="list-style-type: none"> Inspect and maintain the IT equipment/systems in the business premises regularly, and carry out immediate inspection and maintenance works in the event of an emergency to ensure the normal operation of the organisation's business 		<ul style="list-style-type: none"> Repair IT equipment / systems 111403L3
Crisis Management: <ul style="list-style-type: none"> Implement public relations crisis management policy in accordance with relevant policies, principles and procedures for crisis management and public relations 		<ul style="list-style-type: none"> Implement public relations crisis management policy 111222L3

Job 49	Information Technology Assistant / IT Support Assistant / Computer Operator	
Major Job Scope		Associated UoC Title and Code
Operations & Support: <ul style="list-style-type: none"> Use information equipment/systems, data entry systems and perform basic repair work at the operating site properly in accordance with the organisation's established work procedures and equipment manufacturer's guidelines Perform daily server backup and maintenance work at specific intervals Provide users with real-time and comprehensive monitoring of web servers and provide users with solutions to deal with problems (e.g. server downtime and excessive memory usage, resulting in long response time or even access interruption) 		<ul style="list-style-type: none"> Operate IT equipment / systems for retail business 111398L2 Handle daily backup and maintenance of server 111401L2 Manage and monitor the webpage server 111407L3
Crisis Management: <ul style="list-style-type: none"> Manage self-quality properly in order to build a good image of retail practitioner in daily work and reduce the risk of public relations crisis for the organisation 		<ul style="list-style-type: none"> Self-quality management 111238L1

End

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**Specification of Competency Standards
for the Retail Industry in Hong Kong (Version 2.0)**

Part III: Units of Competency

List of Competencies for the Retail Industry

Units of Competency for 'Strategic and ESG Management'

<u>Level</u>	<u>Title</u>	<u>Code</u>	<u>Credit</u>	<u>Page</u>
Level 2	Assist in protecting intellectual property (IP)	111220L2	1	2
Level 3	Comply with business laws	111221L3	6	3
Level 3	Implement public relations crisis management policy	111222L3	4	4
Level 4	Implement business plan	111223L4	6	5
Level 4	Audit loss prevention policies	111224L4	6	6
Level 4	Manage budget and financial plan	111225L4	6	7
Level 4	Promote public relations crisis management policy	111226L4	4	8
Level 5	Formulate crisis management policies in public relations for relevant areas of work, and monitor the progress of responding to and handling crisis	111227L5	6	9
Level 5	Manage corporate costs	111228L5	6	10
Level 5	Manage corporate surplus	111229L5	6	11
Level 6	Develop and implement policies of the organisation	111230L6	6	12
Level 6	Formulate sustainable business strategies	111231L6	6	14
Level 6	Formulate financial management policies	111232L6	6	16
Level 6	Build an organisational image	111233L6	6	17
Level 6	Understand the legal knowledge of network transaction safety	111234L6	6	18
Level 6	Develop risk management policies and procedures related to intellectual property (IP)	111235L6	4	20
Level 7	Formulate business and talent strategies	111236L7	6	21

Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

<u>Level</u>	<u>Title</u>	<u>Code</u>	<u>Credit</u>	<u>Page</u>
Level 1	Prepare for commodity display	111237L1	3	23
Level 1	Practise self-quality management	111238L1	3	25
Level 2	Collect market information	111239L2	3	27
Level 2	Produce slides / presentation materials and media kits in line with corporate branding	111240L2	6	28
Level 2	Promote loyalty programmes to customers	111241L2	6	30
Level 3	Implement strategies for brand promotion and multi-channel sales management	111242L3	6	31
Level 3	Implement advertising and promotional activities	111243L3	6	33
Level 3	Implement a sales plan	111244L3	6	34
Level 3	Edit the text content of website	111245L3	6	35
Level 3	Edit the image content of website	111246L3	6	36
Level 3	Edit the audio content of website	111247L3	6	37
Level 3	Edit the video content of website	111248L3	6	38
Level 3	Make use of technology to enhance creativity and efficiency	111249L3	3	39
Level 4	Build and lead a sales team	111250L4	6	40
Level 4	Implement a market research proposal	111251L4	6	42
Level 4	Implement and monitor marketing activities	111252L4	6	43
Level 4	Manage goods promotional activities	111253L4	6	44
Level 4	Plan multi-channel marketing communications	111254L4	3	46
Level 4	Implement advertising strategies	111255L4	3	47
Level 4	Manage the content for website / digital marketing	111256L4	6	49
Level 4	Implement sales team incentive plans	111257L4	3	50
Level 5	Formulate a market research proposal	111258L5	6	51
Level 5	Formulate brand promotion and multi-channel sales management strategies	111259L5	6	52
Level 5	Forecast product sales performance	111260L5	6	54
Level 5	Manage an online retail brand	111261L5	6	56
Level 5	Formulate after-sales service plans	111262L5	3	58
Level 5	Formulate product pricing strategies	111263L5	6	59
Level 5	Formulate sales team incentive plans	111264L5	3	60
Level 5	Manage website advertisement	111265L5	6	61
Level 5	Establish the overall framework of website content	111266L5	3	62
Level 5	Develop digital marketing strategy	111267L5	6	63
Level 6	Formulate sales team management strategies	111268L6	6	64
Level 6	Formulate marketing, marketing channels and media strategies	111269L6	6	66
Level 6	Monitor the retail market trends and formulate market development objectives	111270L6	6	67

Units of Competency for ‘Customer Relationship Management’

<u>Level</u>	<u>Title</u>	<u>Code</u>	<u>Credit</u>	<u>Page</u>
Level 2	Provide product information	111271L2	3	70
Level 3	Deal with customer complaints	111272L3	6	71
Level 3	Investigate customer satisfaction	111273L3	6	72
Level 4	Manage crisis of social media public relations	111274L4	6	73
Level 4	Manage crisis of internet public relations	111275L4	6	74
Level 5	Maintain and improve customer relationship strategy	111276L5	6	75
Level 5	Explore potential requirements of customers	111277L5	6	77
Level 5	Apply technology to support customer relationship management	111278L5	6	78
Level 5	Analyse, plan and optimise Customer Relationship Management system	111279L5	6	79
Level 6	Manage business partner relationship	111280L6	6	81

Units of Competency for ‘Merchandising / E-commerce Merchandising’

<u>Level</u>	<u>Title</u>	<u>Code</u>	<u>Credit</u>	<u>Page</u>
Level 2	Handle trade documents	111281L2	6	83
Level 2	Handle payments for purchases	111282L2	3	84
Level 3	Implement the purchase	111283L3	6	85
Level 3	Introduce products	111284L3	6	86
Level 3	Buy goods	111285L3	6	87
Level 3	Implement quality control of goods	111286L3	3	88
Level 4	Handle problems with suppliers	111287L4	6	90
Level 4	Establish partnerships with suppliers	111288L4	6	91
Level 4	Import goods	111289L4	6	92
Level 5	Manage relationships with suppliers	111290L5	6	93
Level 5	Negotiate a contract	111291L5	6	95
Level 5	Plan a purchasing system	111292L5	6	96
Level 5	Purchase goods	111293L5	6	97
Level 5	Research and analyse the latest life trends and design trends; plan, design and implement creative visual merchandising strategies	111294L5	4	98
Level 6	Manage international purchasing	111295L6	6	99
Level 6	Formulate purchasing strategy	111296L6	6	101

Units of Competency for ‘Supply Chain Management’

<u>Level</u>	<u>Title</u>	<u>Code</u>	<u>Credit</u>	<u>Page</u>
Level 1	Handle commonly-used shipping documents	111297L1	3	104
Level 1	Receive goods for storage	111298L1	3	105
Level 1	Package goods in distribution centres	111299L1	6	106
Level 2	Implement goods delivery	111300L2	6	107
Level 2	Receive returned goods in distribution centres	111301L2	3	108
Level 3	Implement the import and export of goods	111302L3	3	109
Level 3	Supervise the delivery of goods	111303L3	6	110
Level 3	Supervise the product distribution process	111304L3	6	111
Level 3	Implement logistic safety and health management measures	111305L3	3	113
Level 3	Monitor the inventory level to meet the demand	111306L3	3	115
Level 3	Implement inventory procedures	111307L3	6	116
Level 3	Arrange maintenance and repair for transportation means	111308L3	3	118
Level 3	Perform retail inventory management	111309L3	6	119
Level 4	Implement e-commerce logistics operating procedures	111310L4	6	121
Level 4	Implement logistics management business continuity plans	111311L4	6	122
Level 4	Manage inventory	111312L4	6	123
Level 4	Provide logistic support	111313L4	6	124
Level 4	Manage imported and exported goods for cross-border e-business	111314L4	6	125
Level 5	Formulate inventory control systems	111315L5	6	126
Level 5	Optimise warehouse space utilisation and layout planning	111316L5	3	127
Level 5	Manage logistics equipment	111317L5	3	129
Level 5	Establish and maintain a supply chain	111318L5	6	131
Level 5	Formulate inventory management strategies	111319L5	6	132
Level 5	Develop logistics management business continuity plans	111320L5	6	134
Level 6	Improve the supply and distribution chain	111321L6	6	135
Level 6	Formulate cross-border logistics solutions	111322L6	6	137
Level 6	Handle logistics crises	111323L6	6	138
Level 6	Formulate risk management plans	111324L6	3	139
Level 6	Manage third party logistics services	111325L6	6	140
Level 6	Formulate cross-border warehousing and logistics strategy	111326L6	6	142

Units of Competency for 'Customer Services'

<u>Level</u>	<u>Title</u>	<u>Code</u>	<u>Credit</u>	<u>Page</u>
Level 1	Provide support and advice to customers	111327L1	3	144
Level 1	Serve customers	111328L1	3	145
Level 2	Build up relationship with customers	111329L2	3	146
Level 2	Use good communication skills to facilitate transactions	111330L2	3	147
Level 3	Implement quality customer service scheme	111331L3	6	132
Level 3	Master consumer psychology and behaviour	111332L3	3	150
Level 3	Handle customers' complaints	111333L3	3	151
Level 3	Manage customer service performance of frontline staff	111334L3	3	152
Level 4	Review products and services to maintain customer satisfaction level	111335L4	3	153
Level 4	Review customer service scheme	111336L4	6	154
Level 4	Lead the team to adapt to the renewal and change of the technology system	111337L4	4	155
Level 4	Oversee the channels for collecting customer opinions and analyse the opinions	111338L4	4	157
Level 5	Establish customer service performance criteria	111339L5	3	159
Level 5	Establish quality guarantee for customer satisfaction	111340L5	6	161
Level 5	Formulate customer service scheme	111341L5	3	162
Level 6	Formulate customer relationship management strategies	111342L6	6	163
Level 6	Formulate customer service management strategies	111343L6	6	165

Units of Competency for ‘Store Operations’

<u>Level</u>	<u>Title</u>	<u>Code</u>	<u>Credit</u>	<u>Page</u>
Level 1	Implement hygiene procedures	111344L1	3	168
Level 2	Perform retail sales system clearing	111345L2	3	169
Level 2	Replenish shelves	111346L2	3	170
Level 2	Commit to the work of the retail team	111347L2	3	171
Level 2	Process orders	111348L2	3	173
Level 2	Handle cash and credit card transaction payment	111349L2	6	174
Level 2	Implement work safety guidelines	111350L2	6	175
Level 2	Keep the retail environment clean and tidy	111351L2	3	176
Level 3	Implement store design plan	111352L3	6	178
Level 3	Implement shop security procedures	111353L3	3	179
Level 3	Deploy staff	111354L3	3	180
Level 3	Set up goods classification	111355L3	6	182
Level 3	Use the retail sales system	111356L3	3	184
Level 3	Implement commodity display	111357L3	6	186
Level 4	Manage and maintain workplace	111358L4	6	188
Level 4	Manage the termination of franchise	111359L4	6	190
Level 4	Manage the retail team	111360L4	3	191
Level 4	Inspect the product loss prevention measures	111361L4	3	193
Level 4	Manage the financial resources of the retail store	111362L4	6	194
Level 4	Manage retail store inventory	111363L4	6	195
Level 4	Manage store displays	111364L4	6	197
Level 4	Manage the subordinate’s work performance	111365L4	6	199
Level 5	Develop risk management strategies	111366L5	3	200
Level 5	Draw up store and window design plans	111367L5	3	202
Level 5	Establish the retail sales system	111368L5	6	204
Level 5	Formulate a retail store risk management plan	111369L5	6	206

Units of Competency for ‘Human Resource Management & Development’

<u>Level</u>	<u>Title</u>	<u>Code</u>	<u>Credit</u>	<u>Page</u>
Level 1	Comply with anti-bribery law and adopt a high standard of integrity in performing retail functions	111370L1	1	209
Level 2	Record and verify staff attendance information	111371L2	6	210
Level 2	Handle staff records	111372L2	3	212
Level 2	Apply general labour regulations	111373L2	6	214
Level 3	Recruit and select personnel	111374L3	3	216
Level 3	Handle staff complaints	111375L3	3	217
Level 3	Provide in-service training	111376L3	3	218
Level 3	Implement human resources policies	111377L3	3	220
Level 3	Promote equality policy	111378L3	6	222
Level 3	Implement staff appraisal policy	111379L3	3	223
Level 3	Implement “clean” business practices, good controls and integrity management	111380L3	3	225
Level 4	Manage the human resources information system	111381L4	3	227
Level 4	Analyse training needs and develop staff training and development programmes	111382L4	3	229
Level 4	Handle general labour disputes	111383L4	6	230
Level 4	Handle staff remuneration and benefits	111384L4	6	232
Level 5	Formulate a staff training and development plan	111385L5	3	234
Level 5	Formulate a staff retention plan	111386L5	6	236
Level 5	Apply methods to improve team execution capacity	111387L5	6	237
Level 6	Formulate human resources strategy and policies	111388L6	3	238

Units of Competency for 'Data Analytics'

<u>Level</u>	<u>Title</u>	<u>Code</u>	<u>Credit</u>	<u>Page</u>
Level 3	Perform website traffic analytics	111389L3	3	241
Level 3	Perform website traffic time analytics	111390L3	3	242
Level 3	Perform website visitor analytics	111391L3	3	243
Level 3	Perform search engine analytics	111392L3	3	244
Level 3	Perform customer order analytics	111393L3	3	245
Level 4	Analyse website data and prepare report	111394L4	6	246
Level 5	Analyse customers' purchase patterns	111395L5	6	247
Level 5	Analyse business data	111396L5	6	249

Units of Competency for 'Information Technology'

<u>Level</u>	<u>Title</u>	<u>Code</u>	<u>Credit</u>	<u>Page</u>
Level 2	Undertake general administrative work for accounts services	111397L2	3	251
Level 2	Operate IT equipment / systems for retail business	111398L2	3	252
Level 2	Retain online customers	111399L2	3	254
Level 2	Conduct online sales	111400L2	3	256
Level 2	Handle daily backup and maintenance of server	111401L2	3	257
Level 3	Handle customer profile and activity record	111402L3	4	258
Level 3	Repair IT equipment / systems	111403L3	3	259
Level 3	Manage online brands	111404L3	6	260
Level 3	Manage online shopping	111405L3	3	262
Level 3	Manage online inventory	111406L3	6	264
Level 3	Manage and monitor the webpage server	111407L3	6	266
Level 4	Incorporate and fine-tune the proposals by other organisations such as outsourcing party	111408L4	3	267
Level 4	Deliver the database operations services	111409L4	14	268
Level 4	Manage online sales system	111410L4	3	269
Level 4	Set up IT equipment needed for retail operations	111411L4	3	271
Level 4	Deploy information technology equipment / systems for retail operations	111412L4	3	272
Level 4	Use mobile technologies to improve sales service	111413L4	6	274
Level 4	Implement e-retail business model	111414L4	6	275
Level 4	Manage online commercial risks	111415L4	6	277
Level 4	Master mobile payment services	111416L4	6	279
Level 5	Monitor and control the project cost	111417L5	2	280
Level 5	Establish and maintain system support services process	111418L5	8	281
Level 5	Plan and develop an online business website	111419L5	6	283
Level 5	Evaluate online business	111420L5	6	285
Level 5	Use new technologies to conduct retail business	111421L5	6	287
Level 5	Develop an e-retail business model	111422L5	6	289
Level 5	Evaluate the performance of the customer service IT systems	111423L5	3	290
Level 6	Manage IT projects	111424L6	6	292
Level 6	Build an online retail platform	111425L6	3	293
Level 6	Manage an enterprise resource plan	111426L6	3	295

Units of Competency for 'Specific Product Knowledge'

<u>Level</u>	<u>Title</u>	<u>Code</u>	<u>Credit</u>	<u>Page</u>
Level 3	Arrange the exhibition items of the showroom	111427L3	6	298
Level 3	Identify and use display materials	111428L3	3	300

Units of Competency for ‘Strategic and ESG Management’

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Strategic and ESG Management’

1. Title	Assist in protecting intellectual property (IP)
2. Code	111220L2
3. Range	This unit of competency (UoC) is applicable to retail staff. Practitioners have the ability to understand the importance of IP and the “No Fakes Pledge” Scheme in order to assist the organisation in maintaining a free and fair business environment, protecting IP and avoiding any infringing activities. It enables staff to address customers’ questions about the genuineness of the organisation’s products, thereby consolidating customers’ confidence in the organisation.
4. Level	2
5. Credit	1 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the fundamental concept of IP</p> <ul style="list-style-type: none"> ◆ Understand what is considered IP as well as the values and importance of IP ◆ Understand about the different types of Ips including trade marks, patents, designs, copyrights, etc. ◆ Understand that IP is an important intangible asset to the organisation subject to commercial usage and has value ◆ Understand the basic elements that constitute infringement (e.g. without the permission of the copyright owner), and the organisation’s risk management policies and procedures for protecting intellectual property (e.g. requesting permission from the copyright owner) ◆ Understand the “No Fakes Pledge” Scheme <p>6.2 Assist in protecting IP</p> <ul style="list-style-type: none"> ◆ Identify IP in business context in accordance with the types of IP defined by Intellectual Property Department <ul style="list-style-type: none"> • Trade marks • Copyright (applicable to books, animation & comic creations, audio-visual works, computer programmes, etc.) • Trade secrets (applicable to customer lists, ingredient lists, etc.) and know how (applicable to manufacturing process, formulation, etc.) ◆ Demonstrate understanding of the relevance of trade marks and copyrights in commercial and promotional activities, in particular those circumstances where civil or criminal liabilities may arise (e.g. selling counterfeit or pirated goods, performing, playing or showing copyrighted works in public, and disputing on the ownership of IP in the work created by a contractor) ◆ Assist in protecting IP within the respective functional area and rejecting infringements (e.g. use genuine software) in accordance with the organisation’s policies and established procedures ◆ Carry out the “No Fakes Pledge” Scheme according to the organisation’s policies (e.g. explain to customers how to distinguish the authentic or counterfeit products) <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Address customers’ questions about the genuineness of the organisation’s products, thereby consolidating customers’ confidence in the organisation
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Explain the aims of the “No Fakes Pledge” Scheme and its benefits for the organisation; ◆ Identify IP in business context; and ◆ Assist in protecting IP, rejecting infringements, and carrying out the “No Fakes Pledge” Scheme in accordance with the organisation’s policies and established procedures (e.g. explain to customers how to distinguish the authentic or counterfeit products).
8. Remark	

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Strategic and ESG Management’

1. Title	Comply with business laws
2. Code	111221L3
3. Range	This unit of competency (UoC) is applicable to retail staff. Practitioners have the ability to understand the business laws of Hong Kong, the Mainland and regions of other trading partners; follow and apply them in daily operation and management of the organisation in order to protect the benefit of the organisation.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of business and laws</p> <ul style="list-style-type: none"> ◆ Understand the legal system of Hong Kong, including: <ul style="list-style-type: none"> • Understanding whether the client has entered a legal binding contract • Understanding the reasons for a contract to be invalid and the compensation for breach of contract • Applying the Sale of Goods Ordinance and compare the rights and obligations of both the buyer and the seller • Understanding the nature of agency • Understanding the laws related to tort and the principle for claiming damages • Understanding the pros and cons of different business models and their modes of operation • Understanding the conditions and procedures of filing petitions for individual bankruptcy and liquidation of a limited organisation • Understanding the legal meaning of the laws of guarantee and their provisions ◆ Understanding the law of contract, foreign investment law and company law in the Mainland and the regions of other trading partners, and compare the major differences and similarities between the business laws in the Mainland and Hong Kong <p>6.2 Comply with business laws</p> <ul style="list-style-type: none"> ◆ Comply with the following business laws and apply them in the organisation’s daily operation <ul style="list-style-type: none"> • The legal system of the Hong Kong Basic Law • Law of Contract • Sale of Goods Ordinance • Law of Agency • Competition Ordinance • Law of Tort • Business Organisation Law • Bankruptcy and liquidation Laws • Law of Guarantee • Essentials of business laws in the Mainland China • Business laws in regions of other trading partners <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure compliance with business laws in daily operation and no cheating and malpractice
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Perform operational management in the organisation in accordance with the business laws of Hong Kong, the Mainland China and regions of other trading partners to protect the benefit of the organisation.
8. Remark	This UoC is adopted from 105020L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for 'Strategic and ESG Management'

1. Title	Implement public relations crisis management policy
2. Code	111222L3
3. Range	This unit of competency (UoC) is applicable to frontline staff in the retail industry. Practitioners have the ability to apply skills and methods to prevent public relations (PR) crises. Implement PR crisis management policy, principles and procedures in related functional area in the occurrence of crises.
4. Level	3
5. Credit	4 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Master the knowledge of crisis management</p> <ul style="list-style-type: none"> ◆ Understand the composition and operation of corporate PR crisis ◆ Master the common risk identification methods (e.g. root cause analysis, Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis) ◆ Understand the benefits of resolving a PR crisis successfully and the consequences of mishandling ◆ Master the mindset required to handle PR crises (e.g. fact check) <p>6.2 Implement PR crisis management policy</p> <ul style="list-style-type: none"> ◆ Initiate the risk identification process according to the established policies, principles and procedures of the organisation ◆ Use data and common risk identification methods to identify the possibilities of various risks according to the instructions of the superior ◆ Report the possibility of PR risk events to superiors and provide the basis for risk assessment and risk control ◆ Implement PR crisis management policy, principles and procedures in various online and offline channels to help the organisation prevent or resolve crises <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Report the possibility of potential hazards, unsafe behaviours and near-miss incidents to superiors proactively ◆ Be able to remain calm and take effective actions in front of crises or risk events (e.g. be able to provide a verified basis for risk assessment and risk control within 10 minutes)
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Use data and common risk identification methods to identify the possibilities of various risks according to the instructions of the superior; and ◆ Report the possibility of PR risk events to superiors and provide the basis for risk assessment and risk control.
8. Remark	

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Strategic and ESG Management’

1. Title	Implement business plan
2. Code	111223L4
3. Range	This unit of competency (UoC) is applicable to business development staff in the retail industry. Practitioners have the ability to understand the organisation’s business and operating policies, and implement its business plan.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the organisation’s business plan</p> <ul style="list-style-type: none"> ◆ Know the mission and vision of the organisation ◆ Understand the organisation’s business strategy and plan ◆ Master the leadership and project management skills ◆ Master the business-related laws and regulations ◆ Know about business risk management <p>6.2 Implement business plan</p> <ul style="list-style-type: none"> ◆ Confirm all elements crucial to the business plan, such as: <ul style="list-style-type: none"> • Human resources policies • Marketing policy • Business planning • Setting up multi-channel or omni-channel retail stores • Inventory planning • Purchasing • Building supplier and distributor network ◆ Implement and execute the organisation’s business plan ◆ Ensure that funds / resources available are within budget ◆ Prioritise the plans, assign tasks and make a schedule ◆ Ensure that all related units know the schedule, the goals and their tasks ◆ Formulate monitoring procedures to measure the progress and effectiveness ◆ Review regularly the progress of implementation and make adjustments accordingly if necessary ◆ Report to the higher level on the work progress <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure the business plan is implemented to the benefit of the organisation ◆ Ensure the business plan is implemented according to related business laws
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Implement the business plan according to the operating policies of the organisation; and ◆ Review the progress of implementation and make adjustments accordingly.
8. Remark	This UoC is adopted from 105021L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Strategic and ESG Management’

1. Title	Audit loss prevention policies
2. Code	111224L4
3. Range	This unit of competency (UoC) is applicable to internal audit staff in the retail industry. Practitioners have the ability to assess the effectiveness of the loss prevention policies of the organisation, and put forward recommendations for improvement.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 understand the knowledge of audit</p> <ul style="list-style-type: none"> ◆ Master the business strategy of the organisation ◆ Know the internal regulatory system and procedures of the organisation ◆ Master the internal audit criteria ◆ Understand retail-related laws and regulations ◆ Master risk management methods and techniques ◆ Master the loss prevention policies and procedures of the organisation <p>6.2 Audit loss prevention policies</p> <ul style="list-style-type: none"> ◆ Implement audit plan, including: <ul style="list-style-type: none"> • Analysing the loss prevention policies and procedures in detail • Confirming the best auditing method (e.g. by observation, random check) • Confirming resources and manpower needed for audit • Completion schedule for the audit • Finding out procedures in which problems may occur • Assessing the loss and its impact on business, and recommend remedies ◆ Formulate audit training programme for staff ◆ Report the audit result with comments and recommendations (e.g. strengthening the monitoring procedure) <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the audit is carried out independently, objectively and professionally ◆ Ensure the information in the audit report is accurate ◆ Prevent misappropriation of corporate assets and acts of theft
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Audit loss prevention policies for the retail or distribution business of the organisation; and ◆ Submit audit report with recommendations for improvement.
8. Remark	This UoC is adopted from 105022L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Strategic and ESG Management’

1. Title	Manage budget and financial plan
2. Code	111225L4
3. Range	This unit of competency (UoC) is applicable to budget and financial plan management staff in the retail industry. Practitioners have the ability to manage the financial plan, compile the budget and control the expenditure, so as to make the organisation’s financial management more effective.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 understand the knowledge of financial budget and management</p> <ul style="list-style-type: none"> ◆ Understand the accounting principles for limited company ◆ Understand the organisation’s internal audit theory and procedures ◆ Understand the concept of financial plan management, including the knowledge of foreign exchange ◆ Master the concept of crisis management ◆ Understand the latest government policy on retail tax ◆ Master the application of information technology in budget and financial management <p>6.2 Manage budget and financial plan</p> <ul style="list-style-type: none"> ◆ Prepare a budget plan according to the organisation’s indicators, e.g.: <ul style="list-style-type: none"> • Income and expenditure budget • Manpower budget ◆ Prepare a comprehensive financial plan according to organisation’s indicators, e.g.: <ul style="list-style-type: none"> • Comprehensive balance sheets • Comprehensive profit and loss statements • Comprehensive cash flow statements ◆ Manage and control expenditure, e.g.: <ul style="list-style-type: none"> • Salary expense • Wear and tear • Daily expenses of the retail stores / sales locations ◆ Expected risk and return (e.g. foreign exchange risk) ◆ Analyse financial data and prepare budget, such as: <ul style="list-style-type: none"> • Budget of retail stores / sales locations <ul style="list-style-type: none"> ○ With reference to previous business turnover and expenditure ○ Set annual business turnover and estimate expenditure • Compile business turnover reports, including: <ul style="list-style-type: none"> ○ Current business turnover ○ Estimates on business turnover ○ Comparison with previous business turnover ○ Comparison between the estimated and actual business turnover ○ Review regularly according to actual situation, update business goals and expenditure budget ◆ Apply information technology in budget and financial management <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Manage the budget and financial plan according to organisational instructions ◆ Understand the market development and external economic conditions ◆ Prevent any abuse of power or malpractice by making use of the budget and financial plan
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Manage the budget and control the expenditure, evaluate factors related to costs, profits, etc. and manage the organisation’s financial management plan according to its policy, so as to make the management of its retail stores / sales locations more cost-effective.
8. Remark	This UoC is adopted from 105023L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Strategic and ESG Management’

1. Title	Promote public relations crisis management policy
2. Code	111226L4
3. Range	This unit of competency (UoC) is applicable to management staff in the retail industry. Practitioners have the ability to apply professional skills and methods to prevent public relations (PR) crises. Foster PR crisis management policy in related functional area in the occurrence of crises, and ensure that the team understands the relevant policy, principles and procedures.
4. Level	4
5. Credit	4 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the trends in crisis management</p> <ul style="list-style-type: none"> ◆ Understand the types and characteristics of corporate risks (e.g. cybersecurity, regulatory changes) ◆ Understand the overall system and implementation mechanism of risk and crisis management ◆ Understand the importance of effective communication in the occurrence of crises and master various kinds of communication skills and their strengths and weaknesses, such as: <ul style="list-style-type: none"> • Public speeches • Media interviews • Negotiation skills ◆ Understand the organisation’s PR crisis management policy, principles and procedures <p>6.2 Promote PR crisis management policy</p> <ul style="list-style-type: none"> ◆ Assist the team to understand the organisation’s PR crisis management policy <ul style="list-style-type: none"> • Review the implementation of relevant policy with the team regularly (e.g. risk assessment checklists) • Explain any revisions to relevant policy, principles, and procedures to the team before they are made, to ensure that the team understands the new content and effective date ◆ Promote PR crisis management policy and procedures in related functional area <ul style="list-style-type: none"> • Ensure that the organisation’s established PR crisis management policy and procedures are in place, and make appropriate adjustments for individual conditions (e.g. when the suspected product may pose a major threat to public health, buy time for an initial response) • Confirm the response priorities of various stakeholders, and provide timely and accurate information for affected business partners and operating departments • Implement the plan for media releases <ul style="list-style-type: none"> ○ Write clear and relevant content that addresses to the target group ○ Disseminate information timely through established communication channels and protect information about the rights of various stakeholders ○ Maintain a professional manner (e.g. maintaining civility in a complicated environment) and apply appropriate interpersonal skills during media interviews <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Protect the overall benefits of the organisation, customers and business partners in crisis management ◆ Encourage employees to face crises head-on, and cultivate a culture of proactively reporting potential hazards, unsafe behaviours, and near-miss incidents
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Respond to and handle PR crises in accordance with the organisation’s crisis management policy and procedures, and make proper adjustments for special conditions to reduce damage to corporate image; and ◆ Implement the plan for media releases effectively, disseminate information timely and protect information about the rights of various stakeholders.
8. Remark	This UoC is adopted from 105063L5. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Strategic and ESG Management’

1. Title	Formulate crisis management policies in public relations for relevant areas of work, and monitor the progress of responding to and handling crisis
2. Code	111227L5
3. Range	This unit of competency (UoC) is applicable to managerial staff in the retail industry. Practitioners have the ability to formulate crisis management policies in public relations for the organisation in order to reduce the effect on customers and business partners during crises and resume normal operation as soon as possible.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Analyse crisis management theories</p> <ul style="list-style-type: none"> ◆ Understand crisis management theories ◆ Understand the organisation’s crisis management and its principles and procedures for handling public relations ◆ Analyse the coverage and effectiveness, etc. of information released by different media (press conference, newspaper, television, radio, online discussion forums, etc.) ◆ Analyse the operation mode, process and crises of related functional area that likely occur ◆ Master crisis assessment and risk management theories and skills e.g.: <ul style="list-style-type: none"> • Risks of life, properties and environment • Risks of corporate image and business reputation • Macro-environmental effects of the society, e.g. economy, politics, etc. ◆ Review the manpower and resources required, organisation and format of guidelines or instruction in the process of crisis management <p>6.2 Formulate crisis management policies in public relations for relevant areas of work, and monitor the progress of responding to and handling crisis</p> <ul style="list-style-type: none"> ◆ Perform risk assessment for the crisis and formulate crisis management policies and procedures for relevant areas of work <ul style="list-style-type: none"> • Identify potential risks and their reasons, and perform risk assessment • Analyse limitation of crisis management and responses made • Formulate contingency plans for crisis management, follow-up work, etc. and define the role of different parties, structure and way of communication in crisis management • Formulate an appropriate plan for media releases in accordance with the organisation’s policies and legal requirements (e.g. Personal Data (Privacy) Ordinance, Sex Discrimination Ordinance) ◆ Monitor the progress of crisis response and management ◆ Adjust crisis management strategies properly as needed (e.g. verbal response first, then written statement) ◆ Implement subsequent contingency plans for crisis management and follow-up work, including: <ul style="list-style-type: none"> • Review and assess the effectiveness of crisis management, give appropriate improvement suggestions, collect and file related information (e.g. different media reports on the event) • Report details of the incident to all stakeholders • Activate remedial measures (e.g. resumption of operation, remedial plans) <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the crisis management policies in public relations protect the overall benefit of the organisation, customers and business partners
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Formulate effective crisis management policies in public relations and procedures for the organisation to respond to and handle public relations crises and make proper adjustments for special conditions to reduce damage to corporate image; and ◆ Review the effectiveness of crisis management policies and procedures in public relations, and give appropriate improvement suggestions.
8. Remark	This UoC is adopted from 105063L5. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for 'Strategic and ESG Management'

1. Title	Manage corporate costs
2. Code	111228L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for the finance of a retail organisation. Practitioners have the ability to manage the corporate investment so as to select the appropriate investment portfolio.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the basis of corporate costs</p> <ul style="list-style-type: none"> ◆ understand the control costs and expenditure standards; forecast, control, analyse and monitor costs ◆ Understand cost management and accountability <p>6.2 Manage corporate costs</p> <ul style="list-style-type: none"> ◆ Review the basic content of corporate cost management <ul style="list-style-type: none"> • Cost forecast • Cost decision • Cost plan • Cost accounting ◆ Analyse corporate cost management considerations <ul style="list-style-type: none"> • Understand to reduce costs alone as the goal could lead to other objectives of the corporate have adverse effects • Cost control or limited to a single cost; a single cost drop would lead to the total cost of opportunity to rise at the same time • Understand that rising costs do not necessarily cause problems ◆ Propose to optimise the corporate cost solution <ul style="list-style-type: none"> • Combined with the theory of the actual situation • Approaches of corporate cost reduction: <ul style="list-style-type: none"> o Develop new products and improve the design and materials of existing products o Improve staff training to raise their technical level <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Analyse the change of corporate costs so that corporate could reduce costs with product quality assurance
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Understand the basic system of costs and content of corporate costs; ◆ Analyse business costs; and ◆ Propose optimisation solution for corporate costs.
8. Remark	This UoC is adopted from 107264L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Strategic and ESG Management’

1. Title	Manage corporate surplus
2. Code	111229L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for the finance of a retail organisation. Practitioners have the ability to manage the corporate investment so as to select the appropriate investment portfolio.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the concept and function of corporate profit management</p> <ul style="list-style-type: none"> ◆ Within the scope permitted by law, to better reflect the economic benefits of corporate ◆ As a tool for delivering useful information to the outside world ◆ Continuously drive the corporate to change the target strategy <p>6.2 Manage corporate surplus</p> <ul style="list-style-type: none"> ◆ Review of corporate profit distribution projects <ul style="list-style-type: none"> • Distribute profits to investors • Staff welfare facilities • Retained earnings / bonus ◆ Analyse the factors that affect the profit of the corporate <ul style="list-style-type: none"> • Price of the product • Unit cost of the product changes • Product sales • Fixed cost of the product • Understanding revenue sources (e.g. sales, dividends) • Understand the source of costs (e.g. cost of sales, sales expenses, general and administrative expenses) ◆ Apply the corporate profit management method <ul style="list-style-type: none"> • Flexible use of accounting policies • Regulation of production and business activities • Purchase or sell assets and business • Increase the order of customers with profit and understand the number of long -term customers • Expand the source of customers <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Analyse corporate profit factors so as to achieve effective management of corporate with the condition of product quality assurance
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Master the concept of corporate profit management and role; ◆ Understand the corporate profit distribution project; and ◆ Perform corporate profit management.
8. Remark	This UoC is adopted from 107265L5

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Strategic and ESG Management’

1. Title	Develop and implement policies of the organisation
2. Code	111230L6
3. Range	This unit of competency (UoC) is applicable to staff responsible for the policies of a retail organisation. Practitioners have the ability to develop and implement a set of feasible policies in accordance with the established vision, mission, business and manpower planning and plans of the organisation in order to fulfil the governance of the organisation in the long run.
4. Level	6
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Have expert knowledge of organisational policies</p> <ul style="list-style-type: none"> ◆ Understand the importance of developing and implementing policies in order to achieve the goals of the organisation ◆ Have thorough understanding of the management objectives of the organisation, e.g.: <ul style="list-style-type: none"> • Corporate vision • Corporate mission • Business and manpower strategy • Business plans • Policies formulated by the organisation • Positioning of the organisation in the retail industry ◆ Understand that the policies of the organisation do not only serve the organisation but should also take care of the benefit of the community and customers ◆ Have thorough understanding of the regulations and restrictions imposed by law and regulatory bodies on retail enterprises ◆ Master the resources needed for the implementation of organisational policies <p>6.2 Develop and implement policies of the organisation</p> <ul style="list-style-type: none"> ◆ Precisely define the actual targets that the organisational policies developed need to achieve ◆ Obtain support from the senior management of the organisation in order to develop the policies ◆ Accurately calculate the financial, manpower and other resources available for the development of organisational policies ◆ Use creative skills to develop/formulate organisational policies by giving full consideration to the following factors: <ul style="list-style-type: none"> • Objectives set by the senior management • Similar policies of other competitors • Social and customers’ expectation on the organisation • Analyse funding and other resources needed for the respective policies • Evaluate and quantify the achievements brought by the policies • Evaluate the effects of implementing the policies ◆ Formulate implementation procedures for the policies, including: <ul style="list-style-type: none"> • Clearly formulate measures related to policy implementation • Specifically assign persons/units to implement relevant policy measures • Clearly record and save the policy implementation details • Monitor and timely rectify problems arising in the implementation of policies ◆ Establish communication mechanism in order to: <ul style="list-style-type: none"> • Report the policy implementation status to the senior management • Give new instructions to subordinates on policy implementation • Make known to the public/customers the status of implementing the organisational policies <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure compliance with related legislation and restrictions in the implementation of policies ◆ Ensure that the established policies can prevent any abuse of power or malpractice such as abuse / misappropriation of the organisational assets and theft

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Develop a set of feasible policies according to the vision, mission, business and manpower planning and plans of the organisation; ◆ Obtain the resources, manpower and requirements necessary for the implementation of the policies; and ◆ Optimise the governance of the organisation in the long run.
8. Remark	This UoC is adopted from 105032L6. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Strategic and ESG Management’

1. Title	Formulate sustainable business strategies
2. Code	111231L6
3. Range	This unit of competency (UoC) is applicable to decision makers responsible for strategy formulation in the retail industry. Practitioners have the ability to base on the business characteristics of the organisation itself to formulate a series of sustainable business strategies and implementation plans most suitable for the organisation to adopt, out of numerous sustainable business plans of different types such as business continuity plans (BCP), disaster recovery plans (DRP), business recovery plans (BRP), and occupant emergency plans (OEP) etc., in order to protect the benefits of the organisation.
4. Level	6
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Master the knowledge of sustainable business strategies</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s own business characteristics, e.g. products, suppliers, marketing media, customers, competitors, etc. ◆ Master knowledge of relating sustainable business plans to the organisation’s business and projects ◆ Master knowledge necessary for developing strategies for sustainability, including: <ul style="list-style-type: none"> • Requirements of a sustainable business plan as stipulated by ordinances or regulations • Policy statement of a sustainable business plan • Way to have the policy accredited • Announcing and stating the policy details ◆ Understand the general methods of project management, risk management and sustainable business planning ◆ Proficient in business and management skills, e.g.: <ul style="list-style-type: none"> • Communication in business management • Personnel management • Change management • Negotiation and business operation <p>6.2 Formulate sustainable business strategies</p> <ul style="list-style-type: none"> ◆ Assess incidents / crises that may affect business sustainability ◆ Assess other factors that may affect business sustainability such as changes in the political, economic and cultural environment ◆ Develop a series of sustainable business strategies that tally with the organisation’s strategies, actual operation, operating procedures and resources condition based on the above assessment ◆ Formulate strategies and supporting measures upon the occurrence of incidents / crises that may affect business sustainability, including: <ul style="list-style-type: none"> • Business operation policies, procedures and standard • Provide necessary resources to promote the implementation of business sustainability policies • Confirm necessary information for the continuity of key business and formulate management policies for documentation and records • Formulate external communication policies (e.g. with business partners, etc.) to ensure the dissemination of consistent information to avoid rumours or panic situations • Formulate internal communication policies in order to coordinate work related to the formulation of sustainable business strategies ◆ Ensure that the corresponding strategies and measures are based on the rigorous analysis of various kinds of information, including: <ul style="list-style-type: none"> • Effects brought about by important incidents / crises • The organisation’s standard operation and business procedures • The most fundamental customer service requirements • The strategies are formulated in accordance with the regulations as stipulated by the ordinances • Estimate the effect of every sustainable business plan and alternative on cost

	<p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the benefit of the organisation and stakeholders have been taken into account in formulating sustainable business strategies ◆ Prevent any abuse of power or malpractice by the abuse of the established sustainable business strategies
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Base on the business characteristics of the organisation itself to formulate a series of plans, out of numerous sustainable business plans of different types, most suitable for the organisation to adopt and implement; and ◆ Ensure that the formulated sustainable business strategies can protect the long-term benefits of the organisation.
8. Remark	This UoC is adopted from 105034L6. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Strategic and ESG Management’

1. Title	Formulate financial management policies
2. Code	111232L6
3. Range	This unit of competency (UoC) is applicable to financial management policies makers in the retail industry. Practitioners have the ability to master a wide range of financial information; analyse complex planning, design, development and management issues related to financial management; plan and formulate financial management policies and plans by means of relevant information / data such as cost, expenditure and profit, enabling the organisation to achieve maximum economic return. It requires differentiation, evaluation and creative skills.
4. Level	6
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Master the knowledge of financial management policies</p> <ul style="list-style-type: none"> ◆ Master financial management theory and policies, e.g. objectives of financial management ◆ Understand the analysis of financial reports ◆ Understand financial planning and forecasting ◆ Master the elements of capital budgeting ◆ Master the calculation of project cash flow ◆ Understand risk and return <ul style="list-style-type: none"> • System risk and non-system risk • The relation between risk and expected return ◆ Understand latest tax policies for the retail industry established by the Government ◆ Understand the concept of crisis management ◆ Master the application of information technology <p>6.2 Formulate financial management policies</p> <ul style="list-style-type: none"> ◆ Analyse financial statements accurately ◆ Formulate capital budgeting policy ◆ Formulate cost control policy ◆ Formulate project risk and return management policies ◆ Implement financial planning, including: <ul style="list-style-type: none"> • Controlling the business cycle and cash flow • Mastering cash budgeting ◆ Formulate the management policies for operating capital, such as: <ul style="list-style-type: none"> • Controlling cash income and expenses • Controlling inventory • Drawing up and analysing credit policy ◆ Formulate crisis management plans ◆ Formulate plans to apply information technology in financial management <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the financial management policies are formulated for the benefit of both the organisation and the stakeholder groups in the long run ◆ Prevent any abuse of power or malpractice by manipulating the financial management policies
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Make full analysis and evaluation on the organisation’s financial status; and ◆ Formulate financial management policies effectively to tie in with the actual operational situation of the organisation.
8. Remark	This UoC is adopted from 105035L6.

Specification of Competency Standards for the Retail Industry
Units of Competency for 'Strategic and ESG Management'

1. Title	Build an organisational image
2. Code	111233L6
3. Range	This unit of competency (UoC) is applicable to staff in the retail industry responsible for corporate image building. Practitioners have the ability to plan, design, evaluate and consolidate a wide range of information; possess leadership and communication skills; and build a good image for the organisation in the general public and customers.
4. Level	6
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Master the knowledge of building an organisational image</p> <ul style="list-style-type: none"> ◆ Master corporate mission and vision, goals and core values ◆ Understand the importance of building an organisational image to the business ◆ Master the techniques of building professional relationships with the public and the media ◆ Master marketing methods and techniques ◆ Master the positioning of the corporate image in the market ◆ Master relevant laws <p>6.2 Build an organisational image</p> <ul style="list-style-type: none"> ◆ Lead the team to establish and maintain the organisational image, objectives and philosophy ◆ Analyse the organisation's advantage and its market positioning with respect to its: <ul style="list-style-type: none"> • Products • Brands • Goodwill, etc. ◆ Master the channels of building close relationships with the media, customers, suppliers and public, such as media release and charity events, to enhance the organisational image and build up goodwill ◆ Work out publicity plans with relevant departments and staff to enhance the organisational image ◆ Establish interactive communication channels to solicit feedback from the public, staff members, trade unions, business partners and associations <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Respect intellectual property rights and prevent plagiarism ◆ Ensure compliance with relevant commercial laws in the progress of building an organisational image
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Analyse the strengths of the organisation and identify its positioning in the market, so as to build and maintain the organisational image; and ◆ Build relationship with the media, which enables the organisation to meet the expectations of customers and society and protect its goodwill, and build a good image for the organisation.
8. Remark	This UoC is adopted from 105036L6.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Strategic and ESG Management’

1. Title	Understand the legal knowledge of network transaction safety
2. Code	111234L6
3. Range	this unit of competency (UoC) is applicable to business managers, e-business technical staff and legal community. Practitioners have the ability to understand the legal issues of e-business and master the relevant knowledge.
4. Level	6
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the legal knowledge of online transaction security</p> <ul style="list-style-type: none"> ◆ Understand the current situation of safety laws and regulations on online transaction in Hong Kong, China and international. <ul style="list-style-type: none"> • Understanding the laws and regulations relating to the security of online transactions in Hong Kong • Understand the current situation of China and international network transactions legislation • Master the establishment of e-business legal system in Hong Kong, China and international. ◆ Understand the law of online transactions <ul style="list-style-type: none"> • Three ways of implementation <ul style="list-style-type: none"> ○ Online payment, online delivery ○ Online payment, offline delivery ○ Offline payment, offline delivery • Understand the legal system of digital signature <ul style="list-style-type: none"> ○ Understand the legal requirements for digital signature and electronic certification ○ Understand the legal status of digital signatory security certification bodies ○ Understand the legal effect of digital signatures <p>6.2 Understand the legal knowledge of network transaction safety</p> <ul style="list-style-type: none"> ◆ Master the legal relationship between the parties involved in the network transactions <ul style="list-style-type: none"> • Recognise the rights and obligations of buyers and sellers in e-commerce transactions • Understanding the legal relationship between buyers and sellers, in essence, the rights of both parties and obligations. The rights and obligations of buyers and sellers are reciprocal. The seller's duty is the buyer's power, and vice versa • Understand the obligations and responsibilities of the breach, and the remedies available • Understand the legal status of online trading centre ◆ Understand the legal relationship between online trading customers and virtual banks <ul style="list-style-type: none"> • Understand the transaction is through the virtual bank electronic allocated funds • Understand that electronic funds are based on electronic contracts • Understand the basic obligation is in accordance with the instructions of customers, accurate and timely completion of electronic funds transfer • Understand, as the role of sending bank, the responsible in the whole transfer chain for the execution of fund transfer instruction ◆ Master the legal issues related to the protection of intellectual property rights in online transactions, including: <ul style="list-style-type: none"> • Copyright • Patent right • Trademark right • Domain name protection <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Review and properly handle the legal relationship of online transactions ◆ Ensure the online transaction between the corporate and customers would not violate law of the relevant countries or regions
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Understand the laws and regulations of Hong Kong and international network transactions; ◆ Recognise the legal knowledge associated with electronic contracts, digital signatures and identity

	agencies; and ♦ Master the legal relationship between online trading customers and virtual banks.
8. Remark	This UoC is adopted from 107241L6.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Strategic and ESG Management’

1. Title	Develop risk management policies and procedures related to intellectual property (IP)
2. Code	111235L6
3. Range	This unit of competency (UoC) is applicable to staff responsible for the policies of a retail organisation. Practitioners have the ability to develop risk management policies and procedures to establish and uphold trustworthy trading practices, protect IP and avoid any infringing activities for strengthening consumer confidence in the organisation.
4. Level	6
5. Credit	4 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Integrate and understand intellectual property knowledge and IP laws for reviewing the organisation’s IP related risk management policies and formulate relevant policies, including:</p> <ul style="list-style-type: none"> ◆ Understand that the development of Hong Kong as a regional IP trading centre is one of the national development strategies which is instrumental to organisations in protecting and elevating their brands, and helps to enhance their strengths and competitiveness, explore market opportunities and generate greater economic benefits ◆ Know about the different types of Ips (e.g. trade marks, copyright, patents, designs) ◆ Have expert knowledge of the different modes of IP protection (e.g. some IP requires registration in accordance with the law to entitle protection whereas trade secrets and know how are protected by common law of confidence) ◆ Beware of the issues of IP infringement, including the corresponding civil and criminal liabilities ◆ Know about the “No Fakes Pledge” Scheme ◆ Review the organisation’s procedures for formulating and implementing risk management policies <p>6.2 Develop risk management policies and procedures related to IP</p> <ul style="list-style-type: none"> ◆ Apply knowledge of IP and relevant protection measures to ensure compliance with legal requirements ◆ Develop policies and guidelines to prevent the organisation from possessing, exhibiting in public, using, distributing or selling infringing materials (e.g. policies and guidelines concerning selection of products, use of computer software, creation of promotional or display materials, distribution of materials on the Internet) ◆ Formulate implementation procedures for the risk management policies (e.g. regular review of the laws for application of IP protection measures) ◆ Establish communication mechanism to align all levels of staff in different functional areas and to promote staff’s awareness of IP ◆ Protect the organisation’s inventions/creations through registration of trade marks (for brand name), patent and designs (for products) or otherwise (e.g. by copyright which does not require registration in Hong Kong), to enable the organisation to seize market opportunities and gain its competitive advantage through IP commercialisation <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure compliance with related legislation and restrictions in the implementation of risk management policies
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Distinguish different types of Ips and different modes of IP protection; ◆ Develop a set of feasible risk management policies and procedures according to the relevant IP laws and the organisation’s business objectives in order to protect IP and avoid any infringing activities; and ◆ Obtain the resources, manpower and requirements necessary for the implementation of the risk management policies.
8. Remark	

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Strategic and ESG Management’

1. Title	Formulate business and talent strategies
2. Code	111236L7
3. Range	This unit of competency (UoC) is applicable to decision makers in the retail industry. Practitioners have the ability to master a wide range of business information and put forward creative and original ideas from a critical point of view to deal with the complicated and changing business environment in order to formulate overall business and talent strategies for different retail channels, functional units and departments.
4. Level	7
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Monitor the global political situations and the current retail market status, research and predict the future development of global retail business, and formulate overall business and talent strategies for the organisation, including:</p> <ul style="list-style-type: none"> ◆ Monitor the actual situations of current local and global retail markets, including emerging markets, operation management models, talent trends, etc. ◆ Master the essentials of research and forecast of the future development of global retail business ◆ Master the effect of the political situation (e.g. the Mainland’s individual visit scheme) and the regulatory environment on the business of the retail industry <p>6.2 Formulate business and talent strategies</p> <ul style="list-style-type: none"> ◆ Identify for the organisation retail markets with development potential in accordance with local and global economic development (particularly of China) ◆ Conduct critical analysis and research on local and global economic development (particularly of China), in the absence of complete information, to forecast retail market potential of different areas ◆ Use surveys and forecasts to make in-depth and comprehensive analysis on different business and investment opportunities in the retail industry in order to come up with a novel yet appropriate solution ◆ Come up with inventive and unprecedented resolutions in face of the opportunities and challenges in the retail business ◆ Research and identify a wide range of market intelligence, and review and revise the new measures on retail business ◆ Use innovative thinking, reasoning and analytical abilities to solve current and future challenges in order to facilitate the strategic development of the retail business of the organisation ◆ Set the vision for the direction of the business and talent strategies in order to lead all staff of the organisation ◆ Analyse the macro environment and forecast the long-term development trend in order to formulate innovative retail business and talent strategies ◆ Formulate long-term objectives and indicators for different business and talent strategies <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Predict the development trend of the industry when formulating business and talent strategies of the organisation ◆ Formulate innovative retail business and talent strategies to lead the development of the organisation
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Make innovative and appropriate decisions on business opportunities in the retail industry and business and talent strategies of the organisation; and ◆ Provide justifications and consider various factors and analyses e.g. expected return, vision, threats, comparison of different solutions, etc. in the absence of complete information, and formulate business and talent strategies in order to facilitate the long-term development of the organisation.
8. Remark	This UoC is adopted from 105037L7. The UoC title in Chinese is revised.

**Units of Competency for
‘Sales, Marketing and Multi-channel Sales Management’**

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Prepare for commodity display
2. Code	111237L1
3. Range	This unit of competency (UoC) is applicable to staff responsible for giving assistance in showing or displaying commodities in the retail industry. Practitioners have the ability to implement routine work under clear guidance, and complete the preparations for commodity display to align with the organisation’s product promotions.
4. Level	1
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of work related to commodity display</p> <ul style="list-style-type: none"> ◆ Understand the purpose of commodity display, e.g.: <ul style="list-style-type: none"> ● Increase customer flow ● Stimulate customers’ desire to purchase ● Promote new commodity ● Fit in with thematic promotion ◆ Understand factors to be considered in commodity display and act accordingly, including: <ul style="list-style-type: none"> ● Overall image of the store ● Store environment and decoration characteristics ● Category and characteristics of commodities ● Seasonal or special festival considerations ◆ Understand the way of handling commodity display and the related techniques of the industry ◆ Master usage, characteristics and operating methods of various kinds of display equipment, e.g.: <ul style="list-style-type: none"> ● Display racks, shelves ● Pull-up stands ● Clothes-racks and models (apparel exhibits) ● Slogans / price tags ● Containers ● Lighting, audio equipment ● Other related equipment <p>6.2 Prepare for commodity display</p> <ul style="list-style-type: none"> ◆ Confirm details of plans for commodity showing/display with the higher level, including: <ul style="list-style-type: none"> ● Purpose and theme of showing/display ● Type and characteristics of commodities on display ● Special requirements for equipment such as lighting, source of electricity and audio equipment ◆ Check whether the variety of products on display is complete, whether the received quantity is consistent with the receipt, and whether it follows the organisation’s display guidelines for consistency; and understand the display instructions ◆ Complete the commodity display preparations in accordance with the instructions of the higher level, including: <ul style="list-style-type: none"> ● Confirm the appropriate display location and space ● Install/place related racks, lighting and furniture ● Place promotional posters and pamphlets ● Ensure the accuracy of commodity prices and labels ◆ Report to the higher level after completion of preparations <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Adhere to the requirements of related occupational safety and health ordinances in the preparations for commodity display ◆ Understand hygiene requirements of the organisation, related legislation, and retail laws (e.g. Trade Descriptions Ordinance (unfair trade practices), Dutiable Commodities (Liquor) Regulations, Plastic Shopping Bag Charging Scheme, Competition Ordinance, regulations on product packaging and labelling)

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Use various display tools and perform display work according to instructions; ◆ Apply fundamental skills of commodity display and complete the preparations for commodity display under the instructions of the higher level; and ◆ Ensure a smooth implementation of the preparations for commodity display in order to go with the organisation's related commodity promotional work.
8. Remark	This UoC is adopted from 105038L1. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Practise self-quality management
2. Code	111238L1
3. Range	This unit of competency (UoC) is applicable to all staff in the retail industry Practitioners have the ability to manage self-quality properly in order to build a good image of retail practitioner in daily work and reduce the risks of public relations crisis to the organisation.
4. Level	1
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of self-quality management</p> <ul style="list-style-type: none"> ◆ Understand personal strengths and weaknesses ◆ Understand personal character and traits related to work, such as: <ul style="list-style-type: none"> • Dominant type • Outgoing type • Cautious type • Moderate type ◆ Understand the content of self-quality management, including: <ul style="list-style-type: none"> • Time management • Emotion management • Learning management • Health management • Ethical management ◆ Understand the performance indicators and perform according to the work instructions ◆ Know about the specific performance related to self-management ability, such as: <ul style="list-style-type: none"> • Discipline • Patience • Courtesy ◆ Understand the importance of self-quality management to the actual retail work and customer service <p>6.2 Practise self-quality management</p> <ul style="list-style-type: none"> ◆ Master self-personality traits and apply them properly to work, including: <ul style="list-style-type: none"> • Personal character strengths • Personal interests and abilities • Personal work values ◆ Clearly understand the roles and responsibilities of individuals in the team ◆ Build a good self-image, including: <ul style="list-style-type: none"> • Identifying self-values • Having real and specific targets for work ◆ Make good use of the good personal qualities in daily work, e.g.: <ul style="list-style-type: none"> • Explore and make good use of one’s own talents and strengths • Be optimistic and value one’s personal distinctiveness • Be willing to try and creative • Fill oneself with positive elements, e.g. be loyal, enterprising and humble • Be aware of negative and passive elements, e.g. not to be pessimistic, hypocritical, lazy and greedy • Show willingness to continuous learning, demonstrate personal skills and unleash the collaborative genius of the team ◆ Always practise good self-management, including conducting self-evaluation ◆ Apply self-management in actual working environment <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Match the image of the organisation and commodities when practising self-quality management, with the target of providing quality customer service

7. Assessment Criteria	The integrated outcome requirement of this UoC is the ability to: <ul style="list-style-type: none"> ◆ Be able to manage personal quality and exhibit a good image and behaviour as a retail practitioner with ethical conduct.
8. Remark	This UoC is adopted from 105039L1. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Collect market information
2. Code	111239L2
3. Range	This unit of competency (UoC) is applicable to staff responsible for market research in the retail industry. Practitioners have the ability to collect information related to retail market research under supervision in daily working environment.
4. Level	2
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of collecting market information</p> <ul style="list-style-type: none"> ◆ Understand the established market research methods and procedures of the organisation ◆ Understand various channels of collecting market information, e.g.: <ul style="list-style-type: none"> • Clients • Information media of the retail industry (e.g. newspaper, magazine, white paper, seminar, meeting, Facebook fan page, etc.) • Professional organisations / industrial bodies • Related government departments ◆ Understand the importance of collecting market information to corporate business development ◆ Know about ways of collecting market information and their pros and cons ◆ Know about customer online survey, establish information reporting mechanism and implement guidelines <p>6.2 Collect market information</p> <ul style="list-style-type: none"> ◆ Carry out preparations for the collection of market information, and collect relevant information in accordance with corporate guidelines and legal requirements (e.g. Personal Data (Privacy) Ordinance, Equal Opportunities Ordinance and the Anti-discrimination Ordinance, Copyright Ordinance, Competition Ordinance, Trade Descriptions Ordinance), including: <ul style="list-style-type: none"> • Understanding the plan, purpose and objectives of market research of the organisation • Confirming the methods used for collecting market information (e.g. survey, interview, online survey, social media observation and on-the-spot / actual measurement, mystery shopper) • Preparing resources/tools required (e.g. computer, telephone, the internet, stamps, envelopes, video conferencing, suggestion box) • Confirm and use reliable source of information (e.g. customers) in accordance with the corporate guidelines and legal requirements (e.g. the Copyright Ordinance) • Prepare information collection tools (e.g. Survey questionnaires, Survey forms, Email content template) ◆ Collect and process market information in accordance with the corporate guidelines and requirements of the Personal Data (Privacy) Ordinance, e.g.: <ul style="list-style-type: none"> • Choose suitable samples • Conduct interviews • Send out emails / postal questionnaires • Collect, verify and consolidate survey data returned ◆ Process the market information collected properly according to the organisational procedures and refer to related persons to handle <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure legal collection of market information of the retail industry
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Carry out preparations for the collection of market information under supervision and clearly understand the purpose of the market research proposal of the organisation; and ◆ Process the market information and related personal data according to the requirements of the Personal Data (Privacy) Ordinance.
8. Remark	This UoC is adopted from 105040L2.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Produce slides / presentation materials and media kits in line with corporate branding
2. Code	111240L2
3. Range	This unit of competency (UoC) is applicable to marketing staff in the retail industry. Practitioners have the ability to produce slides / presentation materials under supervision, assist in coordinating and creating media kits such as product publicity and promotional contents in familiar and daily situations, and carry out publicity and promotional activities through appropriate media.
4. Level	2
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of publicity and promotional activities</p> <ul style="list-style-type: none"> ◆ Know about the history of products and brands of the organisation ◆ Understand the market position of the organisation ◆ Understand the importance of using correct media kits (e.g. grading of products, size of the major customer groups, and consumer purchasing power) to the publicity of products and brand image of the organisation ◆ Know about the marketing and publicity policies and procedures of the organisation ◆ Know about media kits suitable for different publicity channels, e.g.: <ul style="list-style-type: none"> • Network media kits • Print media kits • Electronic media, electronic news support and traditional advertisement ◆ Understand various contents of media kits, including: <ul style="list-style-type: none"> • Introduction of the company • Latest press release or other media release contents • Customer feedback/complaint • Product / brand information • Information and ways of contact ◆ Understand the scope, allocation and coordination of work of the outsourced PR company and the organisation ◆ Possess writing skills <p>6.2 Produce slides / presentation materials and media kits in line with corporate branding</p> <ul style="list-style-type: none"> ◆ Communicate and liaise with relevant departments to confirm the main purpose, targets and procedures of the promotional activities ◆ Assist the higher level to write press releases and promotional articles according to corporate publicity and promotion policies and the requirements of relevant departments ◆ Coordinate the production of photographs for publicity and promotion with relevant departments / persons in charge of the organisation or the outsourced professional producer and photographer ◆ Confirm and proofread contents of promotional articles, including press releases, comments, customer feedback, electronic articles, manufacturer’s promotional articles, etc. ◆ Display product samples and the list of product benefits in media kits or at promotional activities, and prepare the venue and relevant facilities required ◆ Produce slides / presentation materials in line with the brand image of the organisation in accordance with the nature and target audience of the activities ◆ Collect and pack information required by the media kits, choose appropriate media of communication and confirm that the brand image conforms to corporate standard <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the media kit has complete information and highlight the targets or theme of the promotional activities

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Coordinate the production of slides / presentation materials and media kit contents with relevant departments, and help launching publicity and promotional activities in order to achieve the targets and purpose of the brand promotion and sales activities; and ◆ Launch a comprehensive promotional campaign on different commercial media (e.g. television, newspaper, social media).
8. Remark	This UoC is adopted from 105041L2. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Promote loyalty programmes to customers
2. Code	111241L2
3. Range	This unit of competency (UoC) is applicable to staff responsible for customer service and sales promotion in the retail industry. Practitioners have the ability to introduce / promote the organisation’s loyalty programme to customers, such as members’ benefits and advantages, in order to enhance customer loyalty to the organisation and to exhibit the organisation’s professional service attitude towards customers and its future development policy, etc.
4. Level	2
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of customer loyalty programmes</p> <ul style="list-style-type: none"> ◆ Understand details of the organisation’s customer loyalty programme including periodical special offers, co-branded promotion discounts, gifts, customer redemption and exercise methods, programme implementation guidelines, etc. ◆ Understand the purpose of launching customer loyalty programmes (e.g. to increase customer retention rate, to increase customer support and loyalty, to lower the cost) and the programme content, characteristics, benefits for customers, etc. ◆ Understand customer pain points ◆ Understand good customer relationship skills (e.g. skills in arousing customers’ attention and interest, promotional skills, customer preference) ◆ Understand the basic factors that affect the promotion of customer loyalty programmes ◆ Understand ordinances that protect consumers’ rights and personal privacy data <p>6.2 Promote loyalty programmes to customers</p> <ul style="list-style-type: none"> ◆ Apply customer communication skills to explain / promote the organisation’s customer loyalty programme to customers, including: <ul style="list-style-type: none"> ● Introduce the characteristics and strengths of the organisation’s loyalty programme and its future development ● Provide information about the loyalty programme ● Respond to customers’ questions and inquiries about the programme ◆ Handle all necessary procedures for customers’ participation in the loyalty programme in order to turn them into loyalty ambassadors in accordance with the established procedures <ul style="list-style-type: none"> ● Explain the loyalty programme in detail including its terms and conditions, rules and regulations, etc. ● Assist customers in completing the membership application forms ● Assist customers to complete the membership application procedures ● Confirm customers’ voluntary participation in the loyalty programme by their signature ● Check the accuracy of information provided by customers ● Provide necessary evidence for customers (e.g. membership card / access code for members) ● Plan and formulate loyalty programmes ◆ Regularly report to supervisor the promotion progress of the customer loyalty program, market reaction and customer retention rate <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Comply with the Personal Data (Privacy) Ordinance in collecting customer information ◆ Make recommendations to supervisor to improve the customer loyalty programme
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Introduce and promote the organisation’s loyalty programme to customers including to explain how to use, redemption methods, its financial, life and emotional benefits as well as the brand value; various discounts, and to emphasise privacy protection features; and ◆ Apply customer relationship skills to encourage customers to join the loyalty programme voluntarily in order to enhance customers’ loyalty to the organisation.
8. Remark	This UoC is adopted from 105043L2.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Implement strategies for brand promotion and multi-channel sales management
2. Code	111242L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for brand promotion in the retail industry. Practitioners have the ability to effectively implement the brand promotion strategies established by the organisation in order to help it build an ideal brand image and strengthen its business development.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of brand promotion</p> <ul style="list-style-type: none"> ◆ Understand the established branding and marketing strategies of the organisation ◆ Understand the organisation’s purpose and target for building a brand ◆ Understand the essentials for successful brand promotion, e.g.: <ul style="list-style-type: none"> ● Product image with the public ● Trend ● Preference of the target group of customers ● Product features ● Product design and packaging ● Product price ● Product functions, features and benefits ◆ Understand the strengths and weaknesses of the organisation in multi-channel retail ◆ Understand customer pain points, introduce new technology to provide convenience to customers, and enhance corporate image ◆ Understand government regulations and legal norms on product sales and promotion (e.g. all food safety and drug legislations, labelling legislation (nutritional facts and allergens), Trade Descriptions Ordinance, Personal Data (Privacy) Ordinance, Equal Opportunities Ordinance and the Anti-discrimination Ordinance, Copyright Ordinance, Competition Ordinance) ◆ Understand the implementation guidelines of the promotion and ensure its smooth operation ◆ Understand characteristics and success factors of multi-channel sales management strategies <p>6.2 Implement strategies for brand promotion and multi-channel sales management</p> <ul style="list-style-type: none"> ◆ Confirm the purpose of building a product brand ◆ Master the essentials for building brand image, including: <ul style="list-style-type: none"> ● Brand identity ● Brand positioning ● Pledge of the brand ● After-sales service ◆ Assist in building brand publicity channels to facilitate the publicity and promotional activities, e.g.: <ul style="list-style-type: none"> ● Internal promotion (e.g. staff training and awareness) ● External promotion (e.g. brand, trademark, design) ◆ Implement brand promotional activities and plan, including: <ul style="list-style-type: none"> ● Publicity and promotional activities ● Schedule ● Media publicity portfolio (e.g. online / graphic) ● Customer service promotion ◆ Assess and review the actual effectiveness of the branding strategy and make optimisation suggestions ◆ Understand the market trend, develop modes and ways of promotion proactively and try new promotional ideas/methods <p>6.3 Exhibit professionalism</p>

	<ul style="list-style-type: none"> ◆ Handle and follow up customer inquiries on special offers and promotions ◆ Do not use discriminative wording in advertisements or promotional activities to avoid breaching the discrimination-related ordinances, e.g. the Sex Discrimination Ordinance, the Disability Discrimination Ordinance and the Race Discrimination Ordinance ◆ Ensure that customers can get correct and adequate information during promotion
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Understand the implementation mechanism and guidelines of special offers and discounts, and implement relevant product brand promotion according to the established branding strategies of the organisation in order to achieve the established target of the organisation for brand building; ◆ Assess and review regularly the effectiveness of brand promotion at different stages (e.g. customer's buying cycle) and give suggestions for improvement accordingly; ◆ Assess the target results, master the strategies or practice of market competitors and predict the impact/effect on the organisation; and ◆ Analyse data and devise the promotion workflow, and master the returns and results of implementing brand promotion.
8. Remark	This UoC is adopted from 105044L3. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Implement advertising and promotional activities
2. Code	111243L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for publicity and promotion in the retail industry. Practitioners have the ability to implement advertising and promotional activities according to the established sales strategies of the organisation in order to achieve its sales target.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of advertising and promotion</p> <ul style="list-style-type: none"> ◆ Understand the sales strategies of the organisation ◆ Understand the objectives and purpose of the advertising and promotional activities of the organisation ◆ Know about methods and effects of various types of publicity and promotional activities (e.g. advertisements, sponsors and public relations activities) ◆ Understand the essentials for successful product publicity and promotional activities (e.g. product, price, target audience, venue and advertising) ◆ Understand the effects and the pros and cons of different types of advertising media ◆ Understand the features and promotional value of the organisation’s products ◆ Understand the legal norm and regulations of the government on advertising and promotion <p>6.2 Implement advertising and promotional activities</p> <ul style="list-style-type: none"> ◆ Review and refer to the effectiveness of previous publicity and promotional activities before carrying out advertising and promotional activities ◆ Implement advertising and promotional activities according to the sales target of the organisation <ul style="list-style-type: none"> • Choose appropriate modes of publicity and advertising media (e.g. television, newspaper, package and dynamic / static online advertisement) • Assist in devising the plan of advertising and promotional activities, particularly the publicity mode ◆ Assist supervisor to review regularly and assess the effectiveness of the publicity and promotional activities ◆ Document and properly record the details of advertising and promotional activities according to the guidelines and procedures of the organisation for future reference <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Do not use discriminative wording in advertisements or promotional activities to avoid breaching the discrimination-related ordinances (e.g. the Sex Discrimination Ordinance, the Disability Discrimination Ordinance and the Race Discrimination Ordinance) ◆ Ensure that customers can get correct and adequate information during promotion
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Implement advertising and promotional activities according to the sales strategy of the organisation in order to achieve the established sales target and enhance the image of the organisation and product.
8. Remark	This UoC is adopted from 105046L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Implement a sales plan
2. Code	111244L3
3. Range	This unit of competency (UoC) is applicable to sales staff in the retail industry. Practitioners have the ability to implement a sales plan in daily work in order to achieve the sales target.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of sales plan</p> <ul style="list-style-type: none"> ◆ Understand the target of the organisation’s sales plan ◆ Possess the knowledge of daily operation management of a retail store, e.g.: <ul style="list-style-type: none"> • Managing human and required resources • Inventory management and procedures for relevant sales channels • Product promotion (e.g. product display, shelf arrangement, places to put posters and price tags) • Sales target and performance indicators <ul style="list-style-type: none"> ○ Product information ○ Risk management ○ Clean environment for the store ◆ Understand different sales techniques ◆ Understand the basic elements affecting sales performance, e.g.: <ul style="list-style-type: none"> • Market demand/trend • Customer’s consumption behaviour • Competitor’s marketing activities • Product quality • Customer service (including after-sales service, etc.) • Effect of social events <p>6.2 Implement a sales plan</p> <ul style="list-style-type: none"> ◆ Let all staff clearly understand the marketing plan of the organisation through effective communication channels and encourage them to participate ◆ Implement a sales plan in order to achieve the sales target of the organisation <ul style="list-style-type: none"> • Control the inventory level to ensure adequate supply without overstocking • Provide price reduction and discount programmes • Sales promotion plan (e.g. product display, shelf location, special offers) • Customer retention plan (e.g. friend discount and loyalty programme) • Temporary staff recruitment and training programme to support the sales plan (e.g. big festive sale) ◆ Review and monitor the sales performance, report to the higher level the effectiveness of the sales plan, and make adjustment or suggestions for improvement accordingly <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Build the team spirit with the target to boost the sales when implementing a sales plan
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Implement a sales plan to achieve the sales target of the organisation; and ◆ Review and report to the higher level the effectiveness of the implementation of the sales plan, and make suggestions for improvement.
8. Remark	This UoC is adopted from 105047L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Edit the text content of website
2. Code	111245L3
3. Range	this unit of competency (UoC) is applicable to staff responsible for publicity and promotion in the retail industry. Practitioners have the ability to collect, select, integrate and edit website channel content and write related articles.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of editing website</p> <ul style="list-style-type: none"> ◆ Master the ability of website text editing <ul style="list-style-type: none"> • Understand network application knowledge • Understand the basic technology of website production • Perform news collection and processing of news content and title ◆ Master common software basic operations (e.g. HTML or CSS text editor) <p>6.2 Edit the text content of website</p> <ul style="list-style-type: none"> ◆ Edit the contents of different sites according to corporate policy <ul style="list-style-type: none"> • Edit internet news • Edit the website product description • Edit Weibo promotion • Edit the marketing soft paper ◆ Check the website text editor specification (e.g. title specification, text specification, keyword specification) ◆ Master web page layout, layout attributes and proper usage <ul style="list-style-type: none"> • Set the text font, colour, size and so on • Paragraph layout, line breaks and so on • Project symbol • Special effect <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Implementation could meet the requirements of corporate development ◆ Comply with the latest regulatory requirements of the Government (e.g. the Trade Descriptions Ordinance and the Copyright Ordinance), privacy and information security. The editorial content does not violate the relevant regulations.
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Collect, select, integrate and edit website channel text content; and ◆ Use appropriate software to edit website text content.
8. Remark	This UoC is adopted from 107112L3

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Edit the image content of website
2. Code	111246L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for publicity and promotion in the retail industry. Practitioners have the ability to apply appropriate software to edit the website image content according to business needs.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of editing website</p> <ul style="list-style-type: none"> ◆ Understand the formatting features of the network image, including: JPEG / JPG format, GIF format, PNG format, BMP (Windows dot matrix) format, PICT format ◆ Master the network image collection channels, including: professional image website, website with its own images, search engine, own shooting / production ◆ Understand and follow the copyright procedures for using photos <p>6.2 Edit the image content of website</p> <ul style="list-style-type: none"> ◆ Apply software to edit images (e.g. Photoshop, Lightroom) ◆ Master the criteria for selecting images <ul style="list-style-type: none"> • Technical standards: elements, clarity, exposure, contrast, depth of field • Information standards: the main body, the environment, the tendency or position • Aesthetic standards: composition, moments, emotions, colours • Moral or legal standards: pornography, violence, bloody, infringing right, privacy, reputation, disclosure, national security ◆ Master the perspective of image processing <ul style="list-style-type: none"> • Image trim • Partial light dimming • Edit the contrast of the image and its curve • Turn colour images into black and white images, and bleaching • Fine-tune the colour of the picture, saturation, image filter • Repair the stain on the image • <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Implement to meet the requirements of corporate development ◆ Comply with the latest regulatory requirements of the Government (e.g. the Trade Descriptions Ordinance and the Copyright Ordinance), privacy and information security. The editorial content does not violate the relevant regulations
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Grasp the website image access channels; ◆ Apply commonly used image editing software for editing according to business needs; and ◆ Understand and follow the copyright procedures for using images.
8. Remark	This UoC is adopted from 107113L3

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Edit the audio content of website
2. Code	111247L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for publicity and promotion in the retail industry. Practitioners have the ability to apply appropriate software to edit the website audio content according to business needs.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of editing website</p> <ul style="list-style-type: none"> ◆ Understand the formatting characteristics of network audio <ul style="list-style-type: none"> • Non-distortion format, including: WAV, PCM, ALS, ALAC, TAK, FLAC, APE, WavPack (WV) • Distortion format, including: MP3, AAC, WMA, Ogg Vorbis ◆ Master the network audio collection channels <ul style="list-style-type: none"> • Common channels include: internet radio, professional music website, network sharing platform, search engine • Other channels: own production • Understand and comply with copyright procedures for the use of audio <p>6.2 Edit the audio content of website</p> <ul style="list-style-type: none"> ◆ Master network audio editing standards ◆ Apply software to edit audio (e.g. Audacity, Adobe Audition) ◆ Various transformations for the audio data itself (e.g. fade in, fade out, volume adjustment) <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ In editing and publishing web content audio content, comply with the latest laws and regulations such as copyright, privacy and information safety, etc., to ensure that the audio content does not violate the relevant regulations
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Grasp the website audio access channels; ◆ Apply commonly used audio editing software for editing according to business needs; and ◆ Understand and follow the copyright procedures for using audio.
8. Remark	This UoC is adopted from 107114L3

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Edit the video content of website
2. Code	111248L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for publicity and promotion in the retail industry. Practitioners have the ability to apply appropriate software to edit the website video content according to business needs
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of editing website</p> <ul style="list-style-type: none"> ◆ Understand the formatting characteristics of network video ◆ Understand the features and applications of video codecs (Video Codec) ◆ Understand the streaming technology in market including <ul style="list-style-type: none"> • Unicast / HTTP single point of streaming technology, • P2P peer-to-peer streaming technology, and • Multicast ◆ Understand the hardware and software requirements of various Adaptive Streaming technologies (ABS) ◆ Understand the collection of video content channels, including video sites, search engines and their own production ◆ Determine if the audio source is appropriate <p>6.2 Edit the video content of website</p> <ul style="list-style-type: none"> ◆ Apply software to edit video content (e.g. Adobe Premiere, Avid Media Composer, iMovie) ◆ Edit video contents according to the requirements of business units ◆ Add background audio and subtitles for video content <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ comply with the latest laws and regulations (e.g. Copyright Ordinance, Personal Data (Privacy) Ordinance) to ensure that the video content does not violate the relevant regulations in editing and publishing web content video content
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Master the operation of the video editing software to edit video content; and ◆ Apply appropriate decoding and technology to release video according to the business needs.
8. Remark	This UoC is adopted from 107115L3

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Make use of technology to enhance creativity and efficiency
2. Code	111249L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for customer service, sales, marketing and/or multi-channel sales management in the retail industry. Practitioners have the ability to apply skills, including the use of technology, to enhance creativity in problem solving and innovation so as to increase individual, team and organisational efficiency.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the relevant knowledge</p> <ul style="list-style-type: none"> ◆ Understand the concept of digitisation ◆ Understand the existing technology in the market (e.g. cloud computing) ◆ Recognise emerging innovative business models / processes in the industry (e.g. automated checkout, in-store tracking, auto-replenishment) <p>6.2 Make use of technology to enhance creativity and efficiency</p> <ul style="list-style-type: none"> ◆ Before introduction of innovative technology system / solution <ul style="list-style-type: none"> • Accept the feasibility of innovative technology system / solution to improve work efficiency • Explore potential opportunities of introducing innovations within related functional area and make recommendations to superior • Identify work processes where technology can be used to improve efficiency and make recommendations to superior • Understand the details of potential innovative technology system / solution ◆ Trial period / parallel run period / initial stage of formal introduction of innovative technology system / solution <ul style="list-style-type: none"> • Test innovative technology system / solution to solve business problems (e.g. enhance seamless shopping experience) as directed by superior • Collect business data, information and reports according to the instructions of superior for comparison of individual, team and organisational efficiency before and after the implementation of innovative technology system / solution, and provide the basis for its formal introduction ◆ After introduction of innovation technology system / solution <ul style="list-style-type: none"> • Use cloud creative technology to assist the organisation to build a powerful data analytics platform for improving customer service and experience, sales, marketing and/or multi-channel sales management as a whole • Make recommendations for adjustment and optimisation to superior according to implementation status <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Make reference to best practices in the market to prepare for the introduction of innovative technology system / solution
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Explore potential opportunities to introduce innovations within related functional area and make recommendations to superior; and ◆ Collect business data, information and reports according to the instructions of superior for comparison of individual, team and organisational efficiency before and after the implementation of innovative technology system / solution.
8. Remark	

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Build and lead a sales team
2. Code	111250L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for sales team management in the retail industry. Practitioners have the ability to apply personnel management skills to build and lead a sales team in order to achieve the established business goals of the organisation and boost the sales.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of sales team management</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s strategies and policies for business operation ◆ Master the sales target and product types of the organisation ◆ Possess personnel management knowledge, including: <ul style="list-style-type: none"> ● Communication skills ● Staff training ● Work performance appraisal ● Incentive plan ● Staff establishment ● Staff performance indicators ◆ Understand the laws and regulations relevant to retail (e.g. Equal Opportunities Ordinance and the Anti-discrimination Ordinance, Labour Legislation, Personal Data (Privacy) Ordinance) ◆ Possess knowledge related to sales indicators, e.g.: <ul style="list-style-type: none"> ● Personal / team / district sales target ● Market share ● Customer retention ● Service quality ◆ Understand factors affecting sales performance (e.g. human and financial factors, time / season, materials and equipment) ◆ Understand the importance of building team spirit <p>6.2 Build and lead a sales team</p> <ul style="list-style-type: none"> ◆ Formulate a sales plan according to the organisation’s strategies for business operation in order to achieve the sales target ◆ Build a sales team based on relevant requirements on sales expertise or other success factors ◆ Formulate working guidelines and procedures for the sales team, e.g.: <ul style="list-style-type: none"> ● Sales techniques for different products ● Personal behaviour and customer service techniques ● Team support ◆ share the details of all offers and communicate with the sales team members (individually or the whole team) to ensure that they clearly know the sales target and to build a team spirit ◆ Apply personnel management skills to promote to and encourage the sales team to achieve personal and the team’s sales target <ul style="list-style-type: none"> ● Identify the scope of work of each sales team member ● Distribute resources of the sales team fairly and formulate procedures for claiming resources ● Provide coaching and advice ● Conduct meetings regularly to review and identify areas for improvement ◆ Monitor the sales team to ensure its sales practice complies with corporate and legal requirements ◆ Appraise the performance of the sales team members respectively and retain competent members to help achieve the established sale target <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the sales practice complies with legal requirements ◆ Work on the details and proactively identify opportunities for improvement

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Set a feasible team sales target according to the organisation's business strategies and goals, and make the target clear to the sales team members through effective communications; and ◆ Apply team management and motivation skills to lead the sales team to achieve the sales target.
8. Remark	This UoC is adopted from 105051L4. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Implement a market research proposal
2. Code	111251L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for market research in the retail industry. Practitioners have the ability to apply a series of market research skills to implement a market research proposal according to the market research objectives and strategies of the organisation.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of market research</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s market research needs and objectives for products / services ◆ Master the established market research proposal and strategies of the organisation ◆ Master all kinds of market research skills and methods, e.g. questionnaire survey and mystery shopper ◆ Master the functions, advantages and limitations of market information system/internet/social media ◆ Understand the established format and specifications of the organisation for market research report ◆ Understand factors affecting market research results <p>6.2 Implement a market research proposal</p> <ul style="list-style-type: none"> ◆ Implement preliminary work for market research according to the established market research proposal of the organisation, including: <ul style="list-style-type: none"> ● Mastering the research objectives ● Identifying the source of information ● Checking past research reports and expected results ● Checking the information obtained from customers and suppliers ◆ Coordinate and manage the market research progress ◆ Select a market research method best suited the requirements of the organisation, e.g.: <ul style="list-style-type: none"> ● Questionnaire survey (traditional method/ online survey) ● Interview (telephone/face-to-face) ● Focus group ◆ Identify survey target group and source of information according to the established market research proposal ◆ Choose appropriate IT or network system to collect and analyse market research information for products / services ◆ Compile a market research report and record the survey findings according to the established format and standards of the organisation <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Handle the survey findings to ensure their accuracy and applicability so as to prevent any misleading information
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Apply appropriate market research skills and methods to implement a market research proposal according to the organisation’s market research objectives; and ◆ Apply information technology to analyse market research information and compile a market research report to highlight the key points.
8. Remark	This UoC is adopted from 105052L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Implement and monitor marketing activities
2. Code	111252L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for marketing-related work in the retail industry. Practitioners have the ability to implement and monitor the market promotion plan of the organisation in order to promote and improve its retail business.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of marketing activities</p> <ul style="list-style-type: none"> ◆ Understand the marketing objectives and plan of the organisation ◆ Understand the performance indicators for launching various marketing activities ◆ Master the ability to analyse and process data on market performance, gains and costs ◆ Master leadership skills to manage the marketing team ◆ Master interpersonal skills to launch activities with personnel from different organisations and backgrounds ◆ Understand local and international legal and regulatory requirements related to marketing activities ◆ Understand current market situation <p>6.2 Implement and monitor marketing activities</p> <ul style="list-style-type: none"> ◆ Coordinate staff of the organisation and other working partners in order to launch marketing activities ◆ Implement marketing activities of the organisation, e.g.: <ul style="list-style-type: none"> • Marketing of products • Marketing of services • Forms of marketing (e.g. shopping mall events, online platform, graphics) ◆ Keep in touch with stakeholders when launching marketing activities, including: <ul style="list-style-type: none"> • Staff responsible for finance, human resources and IT • Product manufacturer / supplier ◆ Monitor the performance results of the marketing activities and compare with the original target; report to the higher level for deviations and make suggestions for improvement ◆ Adjust the marketing activities in response to the social or economic situation so as to achieve the sales objective <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Monitor marketing activities and their results; make suggestions for improvement to the higher level in response to the market demand ◆ Ensure no fraud or prejudice when implementing and monitoring marketing activities
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Implement marketing activities according to the marketing plan; and ◆ Monitor the marketing activities and recommend adjustment accordingly.
8. Remark	This UoC is adopted from 105053L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Manage goods promotional activities
2. Code	111253L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for promotional activities in the retail industry. Practitioners have the ability to manage goods promotional activities effectively in accordance with factors such as the organisation’s marketing plan, business objectives and resources invested in order to strengthen the organisation’s overall retail business development.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of goods promotional activities</p> <ul style="list-style-type: none"> ◆ Possess international marketing knowledge ◆ Understand marketing theories ◆ Understand the organisation’s marketing objectives and resources invested in promotion and publicity ◆ Understand goods provided by the organisation and details of goods to be launched, including: <ul style="list-style-type: none"> ● Existing/expected sales performance of goods ● Different sales channels of goods ● Different groups of target customers of goods ● Basic factors affecting the sales performance of goods, etc. ◆ Understand the procedures for collecting and reporting the sales information of goods ◆ Master the business skills and system management methods for goods promotional activities ◆ Master manpower and interpersonal skills for goods promotional activities ◆ Understand related business ordinances and codes governing goods promotion <p>6.2 Manage goods promotional activities</p> <ul style="list-style-type: none"> ◆ Apply organisation and management skills to manage, coordinate and monitor the goods promotional activities of the organisation, including: <ul style="list-style-type: none"> ● Plan publicity and promotional activities <ul style="list-style-type: none"> ○ Refer to related information channels to give assistance in the planning of publicity and promotional activities ○ Devise and assess publicity and promotional activities to ensure that they fulfil the requirements of the company and are suitable for local culture ○ Plan publicity and promotional activities according to market demand ○ Discuss with related persons to decide the overall publicity and promotion policy / direction ○ Cooperate with colleagues of the accounting department to ensure that the schedule and costs of promotional activities fall within resources budget ○ Formulate the entire promotional plan for products and/or service to be promoted ● Arrange publicity and promotional activities <ul style="list-style-type: none"> ○ Find out and arrange resources required for supporting publicity and promotional activities in order to achieve intended objectives ○ Find out, decide and allocate duties and responsibilities of overseas and local staff responsible for publicity and promotional activities ○ Build relationship with the target groups of the overseas market ○ Support overseas staff who are engaged in publicity and promotional activities ○ Make use of business network to organise publicity and promotional activities ● Review publicity and promotional activities <ul style="list-style-type: none"> ○ Listen to customers’ feedback to assess the effectiveness of publicity and promotional activities and give suggestions for future activities ○ Assess the effectiveness of the planning process in order to formulate and improve future planning for publicity and promotional activities ○ Analyse costs and schedule in order to calculate the effectiveness of publicity and promotional activities ○ Give suggestions and constructive opinions for future development direction <p>6.3 Exhibit professionalism</p>

	<ul style="list-style-type: none"> ◆ Ensure the adherence to all ordinances and governing codes when managing goods promotional activities ◆ Work on the details and proactively identify opportunities for improvement
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Manage goods promotional activities in accordance with factors such as the organisation's business objectives and invested resources; and ◆ Review the effectiveness of publicity and promotional activities and give suggestions for improving future publicity activities.
8. Remark	This UoC is adopted from 105055L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Plan multi-channel marketing communications
2. Code	111254L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for IT and marketing management in the retail industry. Practitioners have the ability to devise a communication plan for the organisation’s multi-channel marketing and sales strategies in accordance with the organisation’s marketing strategies and electronic sales platform, in order to strengthen the organisation’s overall retail business development.
4. Level	4
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of online marketing communications</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s overall marketing strategy ◆ Understand the power and success factors of multi-channel marketing communications ◆ Understand knowledge of online business platform including: <ul style="list-style-type: none"> • Marketing and promotional skills • Online business platform operating skills • Terminology of online business platform • Ways to perform online business promotion and transactions, etc. ◆ Understand in what way the organisation classifies customers into different groups and its purpose ◆ Master different customer groups’ reaction to e-commerce and their acceptance level ◆ Understand the legal norm of online business platform as stipulated by the government and governing bodies ◆ Master the skills in browsing and retrieving information from the online business platform ◆ Understand the essential factors and techniques of successful online interactive communication ◆ Understand different types of information technology security systems and their efficacy ◆ Understand market demand by customers’ reaction online <p>6.2 Plan multi-channel marketing communications</p> <ul style="list-style-type: none"> ◆ Liaise with supervisor and other related persons to set objectives, strategies and marketing plans for multi-channel sales of the organisation ◆ Select appropriate online-to-offline commerce platforms in accordance with factors such as the organisation’s sales strategies, characteristics of goods and target customer group’s consumption behaviour ◆ Identify appropriate e-commerce tools (e.g. software and hardware) ◆ Formulate the work plan, schedule, budget and performance indicators for the development and implementation of multi-channel communication ◆ Formulate the design approach and promotional strategies in order to promote corporate image, strengths and characteristics of goods and services online and offline in a consistent manner ◆ Assess the performance of the selected channels as marketing tools ◆ Assess customers’ response rates in order to make improvement <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the selected channels and their operating procedures comply with related ordinances and regulatory requirements ◆ Work on the details and proactively identify opportunities for improvement
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Devise an effective multi-channel communication plan for the organisation in accordance with its marketing strategies and purposes in order to strengthen the overall retail business development.
8. Remark	This UoC is adopted from 105056L4. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Implement advertising strategies
2. Code	111255L4
3. Range	This unit of competency (UoC) is applicable to marketing staff in the retail industry. Practitioners have the ability to implement advertising strategies according to the sales strategies, marketing plan and publicity objectives of the organisation in order to improve the sales performance of its products and services and enhance the corporate and brand image.
4. Level	4
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of advertising strategy</p> <ul style="list-style-type: none"> ◆ Understand the sales and marketing strategic plan of the organisation ◆ Understand the current situation of the retail industry and the market positioning of the products of the organisation ◆ Understand the characteristics and nature of the products and services of the organisation ◆ Understand the objectives and theory of advertising ◆ Master the consumption behaviour and pattern for different target groups of customers ◆ Understand advertising methods for different target groups of customers ◆ Understand the requirements of government and relevant regulatory bodies for advertising and business practices, e.g.: <ul style="list-style-type: none"> • Anti-discrimination ordinances • Consumer protection ordinances • Copyright Ordinance • Competition Ordinance • Fair trading ordinances • Ordinances for protection of privacy, including online trading security ◆ Understand elements for successful advertising and advertising result assessment <p>6.2 Implement advertising strategies</p> <ul style="list-style-type: none"> ◆ Set target and key performance indicators for business ◆ Confirm the advertising purpose, requirements and positioning according to the sales plan and target of the organisation and product features ◆ Confirm the required advertising resources or budget with relevant departments ◆ Implement advertising strategies and relevant details, e.g.: <ul style="list-style-type: none"> • Purpose and objectives of advertising • Target audience • Performance indicators • Resources required • Work schedule • Advertising media • Relevant legal requirements • Assistance from departments ◆ Work out the executive summary of advertising, including: <ul style="list-style-type: none"> • Characteristics, selling points and information of product • Product and corporate brand image • Organisation profile, objective statement and advertising channels ◆ Discuss and cooperate with the advertising agency to bring out creative advertising ideas in the way and mode of expression, arrangement, application of computer technology, etc. so that the advertisement can make a deep impression on consumers <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure compliance with relevant legal and regulatory requirements when implementing advertising strategies ◆ Work on the details and proactively identify opportunities for improvement

7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Formulate a comprehensive cost-effective and marketing-effective advertising strategy according to the sales and marketing strategies of the organisation in order to enhance the sales performance and publicity effect of a product or service (in terms of market or competitor's reaction and business impact).
8. Remark	This UoC is adopted from 105057L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Manage the content for website / digital marketing
2. Code	111256L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for publicity and promotion in the retail industry. Practitioners have the ability to manage the data of the website back-end system and external system to achieve the website content control in the e-business operation process.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of managing website content</p> <ul style="list-style-type: none"> ◆ Master the concept and characteristics of website content management (e.g. content can be text, image, video) ◆ Understand the common website content management systems (e.g. WordPress, Drupal) <p>6.2 Manage the content for website / digital marketing</p> <ul style="list-style-type: none"> ◆ Execute the website document information management method <ul style="list-style-type: none"> • Edit information: text editor / short-cut function / direct image upload / other plug-in applications • Support multiple document types: normal type / HTML type / external file type / external link type / multiple attachments support • Support “WYSIWYG” edit style: article edit preview / image resource management / support of multiple formats of attached file / support of multiple attachments upload / attachments direct display / support of attachment download and delete ◆ Review and share information <ul style="list-style-type: none"> • Release information: static news release / dynamic news release ◆ Manage comments <ul style="list-style-type: none"> • Delete information: individual deletion / batch deletion • List definition: list display definition / list dynamic arrangement / list filtering • Search document: custom inquiry / full text search ◆ Defend against cybersecurity threat <ul style="list-style-type: none"> • Monitor website security to ensure user information security • Implement security defensive measure to ensure user information security: apply user authentication technology to encrypt user information document for backup <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Not make damage to the interests of corporate and customers’ behaviour in any case ◆ In managing the website user information, comply with the relevant regulations
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Ensure no damage to the interests of corporates and users by using the content for website / digital marketing; and ◆ Comply with the relevant legal requirements when managing the content for website / digital marketing.
8. Remark	This UoC is adopted from 107289L4. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Implement sales team incentive plans
2. Code	111257L4
3. Range	This unit of competency (UoC) is applicable to staff of the management level in the retail industry. Practitioners have the ability to implement the established sales team incentive plans in line with the development of the overall retail business of the organisation so as to motivate and enhance sales performance.
4. Level	4
5. Credit	3 (for reference only)
6. Competency	Performance Requirements
	<p>6.1 Understand the knowledge of sales team incentive plans</p> <ul style="list-style-type: none"> ◆ Understand the current situation and development trend of the overall retail market ◆ Understand the organisation’s sales strategy, marketing objectives and sales team incentive plan ◆ Gauge the performance, competitiveness and development potential of the organisation’s products ◆ Gauge the performance of the organisation’s sales teams, as well as the quality and strengths of individual sales staff <p>6.2 Implement sales team incentive plans</p> <ul style="list-style-type: none"> ◆ Ensure that sales staff are well aware of the details of the organisation’s incentive plans ◆ Establish a positive competitive atmosphere, boost morale, and encourage sales staff to pursue sales performance more aggressively (e.g. including internal competitions quarterly) ◆ Send reminders or messages about team and individual sales performance to sales staff through effective communication channels (e.g. applications) ◆ Pay attention to the performance strengths and weaknesses of sales staff, and give feedback or guidance <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Streamline workflows to help sales team close deals ◆ Review and evaluate the performance of relevant incentive plans regularly, and be able to propose adjustments to the incentive plan according to needs
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Establish a positive competitive atmosphere and boost the morale of sales staff; and ◆ Implement the organisation’s sales team incentive plans and improve sales performance to match the overall retail business development.
8. Remark	

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Formulate a market research proposal
2. Code	111258L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for market research in the retail industry. Practitioners have the ability to collect and analyse market research information for retail services / products; formulate a cost-effective market research proposal so as to achieve the established market research objectives and promote corporate business development.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Analyse market research related knowledge</p> <ul style="list-style-type: none"> ◆ Understand the purpose of conducting market research on products / services, e.g.: <ul style="list-style-type: none"> • Develop and introduce new products / services • Sales promotion ◆ Analyse the methods, techniques and characteristics of market research on products / services ◆ Master factors of consideration when formulating a market research proposal, e.g. manpower, training, costs, etc. ◆ Understand the operation and characteristics of market information system for products / services ◆ Understand the principles, methods and procedures of formulating market research proposal, e.g.: <ul style="list-style-type: none"> • Analyse the scope of research • Confirm research proposal details, including the schedule, implementation procedures, etc. • Set objective criteria for analysis and recommendations • Compile market research report <p>6.2 Formulate a market research proposal</p> <ul style="list-style-type: none"> ◆ Formulate a market research proposal according to the organisation’s requirements and purpose of market research on products / services, including: <ul style="list-style-type: none"> • Identify the purpose and target of market research, e.g.: <ul style="list-style-type: none"> ○ Market research on target groups ○ Market research on products / services ○ Research on pricing ○ Market research on competitors • Choose appropriate market research methods, content and types • Confirm the implementation procedures for research • Work out the content and format of the research report • Assess the performance of the market research proposal ◆ Establish the market research management and monitoring system and mechanism ◆ Formulate the market research policy on online sales <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the market research information provided is correct and do not violate the Personal Data (Privacy) Ordinance
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Collect and analyse market research information on retail products / services and formulate an appropriate market research proposal; and ◆ Establish the market research management and monitoring mechanism in order to achieve the objectives of the market research of the organisation.
8. Remark	This UoC is adopted from 105059L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Formulate brand promotion and multi-channel sales management strategies
2. Code	111259L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for formulating brand promotion and multi-channel sales management strategies in the retail industry. Practitioners have the ability to formulate brand promotion and multi-channel sales management strategies in order to enhance the organisation’s brand image and increase sales amount according to the organisation’s business development direction.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of brand image</p> <ul style="list-style-type: none"> ◆ Master the overall brand image and multi-channel sales management strategies ◆ Understand the organisation’s objectives and purposes for building the brand of the product ◆ Understand various channels and types of brand building (e.g. by creating own brands, by agents, by distributors, by acquisition of brands) ◆ Master various methods and media of brand promotion and their characteristics, e.g. <ul style="list-style-type: none"> • Network media <ul style="list-style-type: none"> ○ Public domain traffic (e.g. Instagram, HKTV Mall, Taobao) ○ Private domain traffic (e.g. the platforms or channels such as self-media and user groups that can connect with users) • Traditional advertising (e.g. television, newspaper, magazines) • Window display design, posters, commodity display design, etc. ◆ Master the current situation and development of the overall retail industry, including: <ul style="list-style-type: none"> • Trend of market development • Consumer psychology • Competitors’ mode of operation • Characteristics and performance of the same type of products • Overall business environment, etc. ◆ Understand the functions, characteristics, strengths and weaknesses, etc. of the products of the organisation ◆ Master various kinds of analytical skills and methods (e.g. Strengths, Weaknesses, Opportunities and Threats (SWOT), Political, Economic, Social, Technical, Environmental and Legal factors (PESTEL) analysis) ◆ Understand the plans and related requirements of the government and the industry with regard to brand certification (e.g. intellectual property, the Made in Hong Kong Mark Scheme) <p>6.2 Formulate brand promotion and multi-channel sales management strategies</p> <ul style="list-style-type: none"> ◆ Formulate the objectives and purposes for brand building (e.g. new and existing products) ◆ Analyse the development trend of the retail market and the condition of economic environment ◆ Collect and analyse market environment information in order to confirm share of target market ◆ Assess and analyse customers’ attitude towards and perception of the product brand ◆ Analyse the market positioning of the product brand ◆ Review and analyse the effectiveness of past marketing activities and give improvement suggestions ◆ Assess and analyse the effectiveness and applicability of various kinds of marketing media, and select the appropriate media for brand promotion and publicity ◆ Formulate new brand strategies, e.g.: <ul style="list-style-type: none"> • Enhance brand awareness • Increase sales channels • Strengthen publicity and promotional activities ◆ Formulate sustainable brand development strategies ◆ Ensure that the formulated brand strategies fit in with the overall image and development need of the organisation ◆ Regularly review the effectiveness of brand promotion strategies, and optimise them as needed <p>6.3 Exhibit professionalism</p>

	<ul style="list-style-type: none"> ◆ Respect intellectual property and avoid infringement acts when formulating brand promotion and multi-channel sales management strategies for the organisation
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Follow the organisation's business development policies to formulate brand promotion and multi-channel sales management strategies in order to enhance the brand image of the products and the organisation; and ◆ Regularly review the effectiveness of brand promotion and multi-channel sales management strategies and make adjustments as needed.
8. Remark	This UoC is adopted from 105060L5. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Forecast product sales performance
2. Code	111260L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for product promotion and inventory management in the retail industry. Practitioners have the ability forecast product sales performance in order to formulate the business planning process and boost the sales.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Be familiar with the knowledge of product sales performance forecast</p> <ul style="list-style-type: none"> ◆ Understand the importance of forecasting sales performance of products to the organisation, e.g.: <ul style="list-style-type: none"> • Increase cash flow • Control inventory • Analyse sales model and trend • Have an in-depth understanding on target customers and products of the organisation ◆ Master the information required for product sales performance forecast, including: <ul style="list-style-type: none"> • Previous and current product sales reports • Previous and current inventory records for products • Relevant information of competitors • Retail market analysis • Customer survey • Previous forecast reports ◆ Understand different types of forecasting methods and skills, e.g.: <ul style="list-style-type: none"> • Market factors index • Chain ratio method • Overall market demand ◆ Forecast factors affecting the accuracy of product sales performance forecast <p>6.2 Forecast product sales performance</p> <ul style="list-style-type: none"> ◆ Perform preliminary work for product sales performance <ul style="list-style-type: none"> • Confirm the forecast period (e.g. short-term, mid-term or long-term) • Collect information, both internal and external • Analyse factors affecting the accuracy of forecast, including: <ul style="list-style-type: none"> ○ Seasonality of business ○ Political events ○ Consumer income ○ Seasonal or climatic change ○ Change in economic environment ◆ Conduct product sales performance forecast <ul style="list-style-type: none"> • Consolidate and analyse collected information and forecast the business operation and development trend of the retail market and the effects • Apply the quantitative and qualitative analytical skills to forecast the product sales performance of the organisation ◆ Compile a product sales forecast report according to the established standards of the organisation ◆ Analyse and compare regularly the discrepancies between the actual sales performance and the sales forecast and their reasons, and keep record of relevant information for future reference <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure the accuracy and actuality of the content of report when forecasting sales performance

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Use appropriate forecasting methods and skills to collect and analyse relevant information, forecast product sales performance and assist in formulating sales planning strategies; and ◆ Analyse the discrepancies between the actual sales performance and the sales forecast and their reasons, and adjust the sales plan accordingly.
8. Remark	This UoC is adopted from 105061L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Manage an online retail brand
2. Code	111261L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for online retail management in the retail industry. Practitioners have the ability to manage an online retail brand in order to build a good corporate image and boost the sales.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Evaluate the knowledge of online retail brand</p> <ul style="list-style-type: none"> ◆ Understand the overall retail brand promotion and marketing strategies of the organisation ◆ Understand factors affecting customer’s online buying habit, e.g.: <ul style="list-style-type: none"> • Characteristics of product (e.g. price, uniqueness, practicality, functions, etc.) • Shopping convenience • Advantages and disadvantages of online shopping • Consumption culture and consumption target ◆ Possess knowledge of the retail industry, e.g. marketing environment factors, online retailing and e-commerce, market development trend, consumer psychology, competitor’s behaviour, market characteristics, etc. ◆ Understand the regulatory and legal requirements of the government on online brand owners and retail environment ◆ Evaluate various online channels and systems for promoting retail brands, e.g.: <ul style="list-style-type: none"> • Search engine (e.g. Yahoo, Google) • Social network (e.g. Twitter, Facebook, Weibo) • Online video (e.g. YouTube, TikTok) • Corporate website and portal • Mobile phone network <p>6.2 Manage an online retail brand</p> <ul style="list-style-type: none"> ◆ Perform preliminary research before promoting an online retail brand in order to identify factors affecting the effectiveness of brand promotion, including: <ul style="list-style-type: none"> • Consumer expectation (e.g. on personal brand image and product positioning) <ul style="list-style-type: none"> ○ Convenient ○ Quick ○ Cheaper than shops on the street • Factors attracting and encouraging consumers to shop online • Website features that enhance the brand value • Personal information of existing users • Consumers’ requirements on online retail products (e.g. price, exclusive offers, speed of delivery) • Ways to attract consumers to shop online <ul style="list-style-type: none"> ○ Online promotion ○ Exclusive online special offer ◆ Master the elements of product branding, including: <ul style="list-style-type: none"> • Brand image • Brand positioning • Brand value ◆ Evaluate marketing environment factors, then integrate the use of online and brand management strategies in order to understand consumers’ buying experience ◆ Identify appropriate online retail systems and channels to maximise the effectiveness of the online retail brand of the organisation (e.g. sales management for group purchase) ◆ Evaluate the impact of utilising online retailing and develop relevant sales strategies ◆ Establish the implementation plan and performance monitoring mechanism of the online retail brand ◆ Monitor and review regularly the status and result of implementation of the retail branding plan to ensure that the established objectives of the organisation are met

	<p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the online retail brand of the organisation meets relevant local and international legal requirements
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Implement the preliminary product brand development and research work to identify the most appropriate online retail systems and channels in order to achieve the purpose of promoting corporate brands; ◆ Regularly monitor and review online retail brand promotion activities to ensure that the online marketing and promotion activities conform to the business policies of the organisation and create the best online retail brand image for the organisation; and ◆ Enhance the online reputation of the organisation's retail brand and master its online sales condition and customers' response.
8. Remark	This UoC is adopted from 105062L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Formulate after-sales service plans
2. Code	111262L5
3. Range	This unit of competency (UoC) is applicable to staff of the management level in the retail industry. Practitioners have the ability to formulate an appropriate after-sales service plan to fit in with the organisation’s customer service and sales strategies in order to assist the retail business development.
4. Level	5
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Evaluate the knowledge of after-sales service</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s customer service and sales strategies ◆ Understand customers’ requirements and purchasing power for goods ◆ Understand the characteristics of the goods of the organisation and its after-sales service ◆ Understand that after-sales service is an important measure to make the organisation responsible for consumers, also a means to increase product competitiveness ◆ Evaluate the details of after-sales service, including: <ul style="list-style-type: none"> • Installation and debug of products for consumers • Technical guidance in areas like usage at the requests of consumers • Guaranteed supply of spare parts for maintenance • Responsibility of maintenance service • Provision of “Three Guarantees” for products, i.e. guarantee for repair, replacement and return • Answering consumers’ enquiries ◆ Understand details of after-sales service provided by competitors <p>6.2 Formulate after-sales service plans</p> <ul style="list-style-type: none"> ◆ Formulate an appropriate after-sales service plan to cope with the organisation’s customer service and sales strategies ◆ Make decisions by referring to the following factors and make the formulated after-sales service network applicable within and outside the territory <ul style="list-style-type: none"> • Local economy and sales ability • Local government policy • Social cultural background • Financial capability of the organisation • Business strategies of the organisation • Brand image of the organisation • Marketing strategies of the organisation, etc. ◆ Formulate the standard of after-sales service quality, and provide quality after-sales service for customers ◆ Formulate the assessment principles for after-sales service, in order to assess the service standard of after-sales service staff ◆ Clearly explain to customers the after-sales service provided by the organisation ◆ Collect consumers’ opinions on the product quality and make improvement accordingly ◆ Regularly review the after-sales service plan (e.g. comparing the service quality of competitors), and give improvement suggestions to the higher level <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the formulated after-sales service plan complies with the related ordinances of the local government
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Formulate an appropriate after-sales service plan to cope with the organisation’s customer service and sales strategies; and ◆ Review the after-sales service plan and give improvement suggestions to strengthen after-sales service network and enhance after-sales service quality.
8. Remark	This UoC is adopted from 105064L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Formulate product pricing strategies
2. Code	111263L5
3. Range	This unit of competency (UoC) is applicable to staff at the management level of the retail industry. Practitioners have the ability formulate a competitive product pricing strategies in order to develop the retail business and to increase competitiveness of the organisation.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Evaluate the knowledge of product pricing</p> <ul style="list-style-type: none"> ◆ Understand the overall business strategy of the organisation ◆ Understand different submarkets and sales volumes of goods of the organisation ◆ Evaluate the key information and data for products of the organisation, including: <ul style="list-style-type: none"> • Whether the product is from single origin or multi-origins • Whether the supply of product can be adjusted at any time or not • Whether the customer demand for product is seasonal or not • Customer response and sensitivity to product price elasticity • Effect of changes in product price on overall profits of the organisation ◆ Understand the competitive environment faced by the organisation’s products ◆ Master the procedures of formulating product pricing strategies ◆ Understand government regulation on product pricing (e.g. Competition Ordinance) <p>6.2 Formulate product pricing strategies</p> <ul style="list-style-type: none"> ◆ Formulate product pricing strategies according to different submarkets and sales volumes ◆ Analyse the consumption power of different groups of customers in order to set an appropriate price range for product ◆ Evaluate products of competitors in order to set an appropriate price, e.g.: <ul style="list-style-type: none"> • Marketing plan • Sales volume • Product features ◆ Consult the higher level of business management of the organisation to confirm the appropriate pricing policy ◆ Cooperate with the organisation’s actuary or colleagues responsible for data analysis to decide the structure of interest rate and return for individual products ◆ Set the final price of different kinds of goods ◆ Inform all levels of staff of the formulated/revised product pricing strategies through effective channels of communication ◆ Review the product price, improve and reset the pricing to cope with the market demand / response when necessary in order to increase sales volume <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the product pricing strategies formulated are competitive and can promote the retail business development
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Formulate competitive product pricing strategies for the organisation; and ◆ Review the product pricing strategies and make improvement suggestions to cope with the market demand or response.
8. Remark	This UoC is adopted from 105065L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Formulate sales team incentive plans
2. Code	111264L5
3. Range	This unit of competency (UoC) is applicable to staff of the management level in the retail industry. Practitioners have the ability to formulate encouraging and motivating sales team incentive plans in accordance with factors such as the organisation’s sales strategies, marketing objectives and resources in order to enhance sales performance to cope with the overall retail business development.
4. Level	5
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Evaluate the knowledge of sales team incentive plans</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s sales strategies and marketing objectives ◆ Master the organisation’s human resources management policies ◆ Master the performance, competitiveness and development potential of goods of the organisation ◆ Understand the current condition and development trend of the overall retail market ◆ Understand the basic factors that affect the sales performance of the organisation (e.g. seasonal factor, competitors) ◆ Master the performance of the organisation’s sales team and the quality of individual salespersons ◆ Evaluate details of the sales team incentive plans of the retail industry, e.g.: <ul style="list-style-type: none"> • Commission arrangement and percentage • Criteria for special recognition and monetary / tangible rewards • Rules of penalty for not meeting targets, etc. <p>6.2 Formulate sales team incentive plans</p> <ul style="list-style-type: none"> ◆ Assess the possibility of increasing sales volume and the cost required in accordance with the existing sales performance of the goods of the organisation and the market condition ◆ Assess the potential and magnitude of raising sales volume by the incentive plan in accordance with the sales team’s past performance and the quality of individual salespersons ◆ Formulate sales team incentive plans, e.g.: <ul style="list-style-type: none"> • Commission percentage that increases progressively with sales volume • Promotion arrangement that accords with long-term sales performance • Profit sharing schemes for outstanding salespersons • Employee stock purchase plans • Special recognition programmes for staff (e.g. bonus or a certificate of appreciation) • Other forms of incentives, etc. ◆ Let related salespersons and executives clearly understand details of the incentive plan by means of effective communication channels ◆ Regularly review and assess the results of the related incentive plan and modify the scheme as needed <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ The sales team incentive plan formulated can enhance team spirit and staff morale
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the ability to:</p> <ul style="list-style-type: none"> ◆ Formulate an encouraging sales team incentive plan that fulfils the organisation’s needs in accordance with factors such as the organisation’s sales strategies and marketing objectives in order to enhance sales performance and cope with the overall retail business development; and ◆ Regularly review and assess the results of the related incentive plan.
8. Remark	This UoC is adopted from 105066L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Manage website advertisement
2. Code	111265L5
3. Range	this unit of competency (UoC) is applicable to staff responsible for publicity and promotion in the retail industry. Practitioners have the ability to manage website advertisement including advertisement scheduling, advertising revenue, contract and customer management.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Evaluate the management concepts of website advertisement</p> <ul style="list-style-type: none"> ◆ Evaluate the publication of advertisement <ul style="list-style-type: none"> • The setting of the advertisement slot, the date, time of the play, and the setting and modification of the playing time • Advertisement publication (publication of multiple advertisement in one slot) • Advertisement publication (publication of one advertisement in multiple slots) ◆ Evaluate the scheduling of advertisement <ul style="list-style-type: none"> • The upload and offline of the advertisement • Set in advance the advertisement publication time • Assign the exposure rate of the advertisement ◆ Evaluate the orientation of advertisement <ul style="list-style-type: none"> • Master the basic orientation technology: geo-targeting, day-to-day orientation, time orientation, web orientation, browser orientation, reader orientation, language targeting, channel targeting, large data targeting, and advertisement targeting • Optimise advertising strategy and increase advertising revenue with a flexible targeting approach and sales plan <p>6.2 Manage website advertisement</p> <ul style="list-style-type: none"> ◆ Audit and manage the advertisement contracts including the date of signing, clients and advertising lists ◆ Manage advertisement clients: client name, contact person, phone, address, advertisement content etc. ◆ Set the advertisement fee: <ul style="list-style-type: none"> • Mode of billing: click, form advertisement • Calculation of the normal billing method: according to the click billing / time billing • CPA (pay-per-view), CPA (pay-per-view), CPS (paid by sales), etc., for advertising purposes <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ In the management of website advertisement, comply with the latest laws and regulations such as copyright, privacy and information security from the government and regulatory organisations to ensure that the relevant regulations would not be violated ◆ Meet the requirements of the corporate development during the implementation of the site advertisement
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Master the basic advertisement management including publication, scheduling, orientation management; and ◆ Manage advertising contracts and customers.
8. Remark	This UoC is adopted from 107118L5

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Establish the overall framework of website content
2. Code	111266L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for publicity and promotion in the retail industry. Practitioners have the ability to establish the overall framework of the website content to support the business operation to provide the required user services according to the business strategy and development plan of the organisation.
4. Level	5
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Evaluate the knowledge of the overall framework of website content</p> <ul style="list-style-type: none"> ◆ Evaluate the planning of the overall layout and design of the website, so as to achieve the following business goals: <ul style="list-style-type: none"> ● Increase the clickthrough rate of the website ● Increase the rate of reposting website content ● Increase the success rate of user registration ● Increase conversion rate of product sales ◆ Master the elements of effective websites (e.g. website title and description, high quality content, page links, user experience) <p>6.2 Establish the overall framework of website content</p> <ul style="list-style-type: none"> ◆ Establish the main process flow of website content framework <ul style="list-style-type: none"> ● Establish the main theme of the website ● Establish the main forms of the website such as the forms of forum/articles etc. ● Define the main content module or channel of the website ● Plan the contents of each module or channel ● Plan other additional modules to operate the website ◆ Plan other contents of the website <ul style="list-style-type: none"> ● Identify corporate identity including: logo, standard colour, standard fonts, promotional slogans ● Set up page configuration method and outlook design ● Set up advertisement planning <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Comply with the latest relevant laws and regulations (e.g. the copyright, privacy and merchandise regulations of the Government and the regulatory body) to ensure that the contents of the website are not violated ◆ Implement the website content plan that meets the requirements of corporate development
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Establish the overall workflow of the website contents; and ◆ Establish appropriate website framework according to different marketing environment.
8. Remark	This UoC is adopted from 107122L5

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Develop digital marketing strategy
2. Code	111267L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for publicity and promotion in the retail industry. Practitioners have the ability to apply knowledge, interest and life experience of users on various platforms to disseminate commodity information so as to achieve promotion purpose.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Evaluate the marketing operation on various platforms</p> <ul style="list-style-type: none"> ◆ Understand the background and the marketing concept of various platforms ◆ Evaluate the digital marketing application strategies of various platforms including: <ul style="list-style-type: none"> ● Make use of third party platform to start digital marketing ● Develop own channels on some platforms ◆ Analyse the marketing characteristics of various platforms (e.g. website traffic volume, costing) <p>6.2 Develop digital marketing strategy</p> <ul style="list-style-type: none"> ◆ Set the ultimate objectives of brand marketing (e.g. brand image building, increase of product exposure) ◆ Analyse the positioning of various platforms to develop the marketing plans, including: <ul style="list-style-type: none"> ● Set the development direction of organisation / brand ● Study the consumption behaviour patterns of platform users ● Select the platforms that fit the positioning and development direction of organisation / brand ◆ Position the content, including: <ul style="list-style-type: none"> ● The breadth and depth of content ● The writing techniques and style ◆ Analyse the factors of successful digital marketing cases and learn from them for content positioning <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Align digital marketing sales strategy with the development direction of the organisation / brand ◆ Follow the latest laws of government and regulatory organisations (e.g. information, privacy and information security) to ensure that the implementation of marketing does not violate the relevant regulations
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Analyse the common strategy of digital marketing; and ◆ Develop the objective, organisation / brand positioning and content orientation of digital marketing.
8. Remark	This UoC is adopted from 107166L5, 107167L5, 107168L5, 107169L5, 107170L5, 107171L5, 107172L5 and 107173L5. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Formulate sales team management strategies
2. Code	111268L6
3. Range	This unit of competency (UoC) is applicable to staff responsible for sales strategy formulation in the retail industry. Practitioners have the ability to analyse and evaluate sales team’s performance, market and competitors’ conditions, etc. in order to formulate sales team management strategies, manpower planning, operation modes and incentive plans to support the organisation’s retail business development.
4. Level	6
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Evaluate the human resources management knowledge</p> <ul style="list-style-type: none"> ◆ Evaluate the structure and functions of the sales teams of the organisation, e.g.: <ul style="list-style-type: none"> • Sales districts • Sales teams ◆ Understand the human resources policies of the organisation in recruitment, selection, training, etc. ◆ Understand the established sales staff salary management policies of the organisation, including: <ul style="list-style-type: none"> • Salary and commission system • Performance appraisal system • Labour related legislation ◆ Master various types of performance appraisal methods and their advantages, including: formal and informal, Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis, etc. ◆ Understand different sales staff training methods ◆ Master the staff relations management strategies of the organisation, e.g.: <ul style="list-style-type: none"> • Mechanism for resolving internal conflicts • Complaint and disciplinary procedures ◆ Understand various ways of motivating and building team spirit and their techniques <p>6.2 Formulate sales team management strategies</p> <ul style="list-style-type: none"> ◆ Analyse the conditions and trend of the supply and demand of sales staff in the retail industry, including: <ul style="list-style-type: none"> • Number of employees • Market demand • Employee turnover rate • Education level • Costs for retaining competent staff ◆ Formulate sales team models and strategies of the organisation, e.g. districts, teams, etc. ◆ Formulate appropriate sales staff management strategies according to the corporate business management and human resources policies <ul style="list-style-type: none"> • Strategy for recruiting qualified sales staff • Ways and strategy for retaining competent staff • Internal training mechanism and strategy • Promotion, reward and punishment system, e.g. powers and functions, promotion ladder, remuneration and benefits, rewards, etc. • Job allocation system • Performance appraisal system • Building team spirit ◆ Analyse and review the performance of sales teams regularly; make improvement suggestions to ensure the established sales target be achieved <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ The sales team management strategies formulated support the development of the organisation’s retail business and cope with the development trend of the industry

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Analyse and evaluate the organisation's demand for sales staff according to its operation objectives and business development; and ◆ Formulate appropriate sales staff management strategies for recruitment, training, management and performance appraisal, etc. according to the organisation's operation and human resources management policies.
8. Remark	This UoC is adopted from 105068L6.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Formulate marketing, marketing channels and media strategies
2. Code	111269L6
3. Range	This unit of competency (UoC) is applicable to staff responsible for policy formulation in the retail industry. Practitioners have the ability to formulate a set of marketing, marketing channels and media strategies most suitable for the business needs of the organisation in accordance with its market development objectives in order to enhance its reputation and market share.
4. Level	6
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Evaluate the knowledge of marketing management</p> <ul style="list-style-type: none"> ◆ Master the development and competitive environment of the overall retail market, including the overseas and local market ◆ Evaluate various market positioning theories, e.g.: <ul style="list-style-type: none"> • Application of marketing portfolio • Consumer goods market • Customer-oriented and product-oriented ◆ Understand the concept of local market environment and market segmentation ◆ Understand the government regulations and requirements on marketing, e.g. local and international ◆ Understand the established mission, operation strategy and market objectives of the organisation ◆ Understand the consumer psychology, demand, etc. of different customer groups ◆ Master the techniques and procedures for research and analysis of market strategic plan <p>6.2 Formulate marketing, marketing channels and media strategies</p> <ul style="list-style-type: none"> ◆ Evaluate the capacity of the organisation, including that of finance, human resources, information technology ◆ Evaluate and interpret information collected, including: <ul style="list-style-type: none"> • Overall retail market condition • Market sales structure • Product life cycle • Target market positioning and its development potential, e.g.: target group of customers, region, service type and market positioning mode • Business operation and development forecast • Shopping motivation, commonly used platforms, consumption pattern and characteristics of the target group of customers • Marketing cost, financial budget, etc. ◆ Forecast the retail market trend and formulate marketing objectives ◆ Formulate methods to manage and monitor the market strategic plan ◆ Connect the market strategic plan and key performance indicators with the established mission and operation strategy of the organisation, and review them accordingly <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the market strategic plan formulated copes with the latest retail market development
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Analyse factors such as market environment, customer behaviour, product features, corporate resources and strengths, in order to formulate a set of marketing, marketing channels and media strategies that can promote the development of the organisation; and ◆ Review and evaluate the effectiveness of the strategies, and make appropriate adjustment and optimisation accordingly.
8. Remark	This UoC is adopted from 105069L6. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Sales, Marketing and Multi-channel Sales Management’

1. Title	Monitor the retail market trends and formulate market development objectives
2. Code	111270L6
3. Range	This unit of competency (UoC) is applicable to staff responsible for marketing policy formulation in the retail industry. Practitioners have the ability to comprehensively analyse and evaluate factors such as market environment, past and present sales performance, operation strategy of the organisation, etc., in order to formulate feasible proactive market development objectives.
4. Level	6
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Knowledge of market development</p> <ul style="list-style-type: none"> ◆ Analyse the retail market trends <ul style="list-style-type: none"> ● Understand the macro and micro environment of the organisation ● Understand different ways of collecting retail business data (e.g. consumer / customer survey, Census and Statistics Department, industry research / survey) ● Understand different analytical tools and skills (e.g. market positioning map, construct proposal) ◆ Formulate market development objectives <ul style="list-style-type: none"> ● Master corporate mission and vision ● Understand the objectives, business portfolio and sales opportunities of the organisation ● Understand the SMART techniques (Self-monitoring Analysis and Reporting Technology) and theory ● Master the operational and analytical skills for various strategies, e.g.: Strengths, Weaknesses, Opportunities and Threats (SWOT), Political, Economic, Social, Technological, Environmental and Legal factors (PESTEL) analysis, etc. ● Understand relevant legal norms and sales codes of practice <ul style="list-style-type: none"> ○ Copyright Ordinance ○ Personal Data (Privacy) Ordinance ○ Code of practice for direct sales <p>6.2 Monitor the retail market trends and formulate market development objectives</p> <ul style="list-style-type: none"> ◆ Discuss and confirm the corporate mission and vision, business policy and development objectives with relevant departments ◆ Use statistical data and market information to analyse the development trends of the market and industry ◆ Analyse existing and potential competitors, including features and quality of their products and services, in order to identify potential opportunities or threats ◆ Forecast future development of the market and the industry ◆ Review and analyse past sales performance indicators to see whether they meet the objectives or not in order to identify factors for success and areas for improvement ◆ Use appropriate analytical methods and skills to evaluate current macro and micro environment as well as competitive potential of the organisation ◆ Analyse and evaluate the past successful market share ratio of the organisation, and master new market opportunities favourable to its business development ◆ Fully consider all factors when developing marketing objectives, corporate plans and modes <ul style="list-style-type: none"> ● Opinions of key stakeholders ● Legal norms for business development ● Business and market forecasts, finance and resources of the organisation ● Strategic goals and relevant performance indicators of the organisation <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ The market development objectives formulated are proactive and can promote corporate business development

7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Analyse and evaluate factors such as marketing needs and market development opportunities of the organisation, in order to develop marketing objectives that match its business policy and support its business development.
8. Remark	This UoC is adopted from 105067L5 and 105070L6. The UoC title is revised.

**Units of Competency for
‘Customer Relationship Management’**

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Relationship Management’

1. Title	Provide product information
2. Code	111271L2
3. Range	This unit of competency (UoC) is applicable to the supporting staff of the corporate e-business units. Practitioners have the ability to understand the corporate products in detail, and provide comprehensive product information to the customers.
4. Level	2
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the corporate product information including:</p> <ul style="list-style-type: none"> ◆ Function of the product ◆ Price of the product ◆ Basic structure of product ◆ Quality and specifications of product ◆ Application areas of product ◆ Advantages of product ◆ Precautions of using the product ◆ Sales channel of product <p>6.2 Provide product information</p> <ul style="list-style-type: none"> ◆ Understand the key features of the products and explain to the customers ◆ Answer the potential questions about the products from the customers ◆ Introduce different sales channels of the corporate <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Introduce the products based on its actual specifications. Could not exaggerate its function and applications ◆ Take reference to the Trade Descriptions Ordinance from the government to ensure the product information provided fulfil the legal requirements
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Comprehensively understand the product information; and ◆ Deliver accurate product information.
8. Remark	This UoC is adopted from 107181L2

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Relationship Management’

1. Title	Deal with customer complaints
2. Code	111272L3
3. Range	this unit of competency (UoC) is applicable to the staff responsible for customer relationship management. Practitioners have the ability to deal with customer complaints about the products or services, resolve the customers’ dissatisfaction and report the complaint.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the principles and methods of handling complaints</p> <ul style="list-style-type: none"> ◆ Understand the corporate guidelines and procedures to handle customer complaints ◆ Master the basic principles of handling complaints <ul style="list-style-type: none"> • Help customers solve the problem • Do not argue with customers and do not use radical language • Protect the interest of corporate ◆ Methods to handle complaints <ul style="list-style-type: none"> • Listen carefully • Ask questions carefully • Record the questions • Politely end the conversation ◆ Identify the types of complaints according to established complaint guidelines and procedures, including those that can be resolved immediately and those that must be reported for resolution ◆ Record the customer complaints including time, channels (e.g. could be in the format of e – mail, website reviews, social media platforms), the details of the complaint issue and complainant etc. ◆ Follow-up with the complaint and provide feedbacks to the customers within a specified period of time with various channels (e.g. email or telephone call) <p>6.2 Deal with customer complaints</p> <ul style="list-style-type: none"> ◆ master technique to handle upgraded complaints ◆ master technique to handle difficult complaints ◆ Look for a win-win situation ◆ Master the technique to comfort highly emotional customers <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Use interpersonal communication skills (e.g. listening) to establish and maintain quality customer service relationships ◆ In dealing with customer complaints, take into account the interests of corporate and customers and to achieve a balance
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Apply the basic principles, methods, and skills in handling complaints and record the handling progress and results.
8. Remark	This UoC is adopted from 107183L3. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Relationship Management’

1. Title	Investigate customer satisfaction
2. Code	111273L3
3. Range	this unit of competency (UoC) is applicable to the staff responsible for customer relationship management. Practitioners have the ability to investigate online customer satisfaction to reduce customer attrition rate and to support the corporate customer relationship management.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the objectives of investigation</p> <ul style="list-style-type: none"> ◆ The core of the investigation is to determine the extent to which products and services meet the customer’s desires and needs. The following objectives should be met: <ul style="list-style-type: none"> • Identify key performance factors that lead to customer satisfaction • Assess the satisfaction indicators of the corporate and the major competitors <p>6.2 Investigate customer satisfaction</p> <ul style="list-style-type: none"> ◆ Select the appropriate investigation methods <ul style="list-style-type: none"> • Understand the business and sales strategy of the corporate • Establish online and offline complaint and suggestion system <ul style="list-style-type: none"> ○ Customer-centric corporate should facilitate their customers to provide their suggestions and complaints by selecting appropriate channels and establishing the system • Build the customer satisfaction form. ◆ Develop the workflow of customer satisfaction investigation <ul style="list-style-type: none"> • Quantify and set the weighting of customer satisfaction indicators • Select appropriate target for investigation • Collect the customer satisfaction data • Apply appropriate software tool to analyse the investigation results • Implement and enhance the investigation plan <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Do not engage in deceptive or fraudulent conduct when reviewing products or services
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Select appropriate tool and methods to conduct investigation to collect effective data of customer satisfaction.
8. Remark	This UoC is adopted from 107184L3. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Relationship Management’

1. Title	Manage crisis of social media public relations
2. Code	111274L4
3. Range	this unit of competency (UoC) is applicable to the staff responsible for customer relationship management. Practitioners have the ability to manage social media crises in accordance with the organisation’s established customer relationship management strategy. When a crisis occurs, practitioners help the organisation discover the root causes of the crisis, reduce the destructive crisis and protect the corporate image and brand from damage.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the characteristics of social media crisis and the harm</p> <ul style="list-style-type: none"> ◆ Understand the characteristics of social media crisis <ul style="list-style-type: none"> • More negative prejudice • Wrong information posted by user • Crisis uncertainty • Crisis urgency • Media attention is high ◆ Understand the harm of social media crisis <ul style="list-style-type: none"> • The outbreak of the speed and intensity is much broader and different from the traditional media • Anyone on the web can cause a crisis <p>6.2 Manage crisis of social media public relations</p> <ul style="list-style-type: none"> ◆ Implement the organisation’s established customer relationship management strategy on social media <ul style="list-style-type: none"> • Prepare: Before the outbreak of the crisis, review potential crisis points, simulate possible crisis situations, and try to prevent them from happening • Evaluate: Collect data to establish the real state of the crisis. The response of the corporate must be able to correspond to the potential impact of the crisis. Use community media tools to help assess the impact of negative messages. • Control: Lesser people involved in the crisis handling would be better. Usually, the more people involved the easier confusion happen. • Respond: A slow response often makes the crisis worse because customers usually think that the corporate do not concern about the problem. <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Implement the social media crisis public relations that shall not contravene the relevant provisions of the laws of Hong Kong (e.g. Copyright Ordinance, Personal Data (Privacy) Ordinance) ◆ Work on the details and proactively identify opportunities for improvement
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Understand the characteristics of corporate crisis in the community media environment; ◆ Implement prior warning procedures before crisis happens; and ◆ Possess the ability to deal with social media crisis.
8. Remark	This UoC is adopted from 107154L4. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Relationship Management’

1. Title	Manage crisis of internet public relations
2. Code	111275L4
3. Range	this unit of competency (UoC) is applicable to the staff responsible for customer relationship management. Practitioners have the ability to operate the monitoring system of network crisis events according to the organisation’s established customer relationship management strategy. When a crisis occurs, practitioners help the organisation discover the root causes of the crisis, reduce the destructive crisis and protect the corporate image and brand from damage.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the characteristics of internet crisis and the harm</p> <ul style="list-style-type: none"> ◆ Understand the characteristics of internet crisis <ul style="list-style-type: none"> • Sudden • Destructive • Uncertainty • Urgency • Public concern ◆ Understand the harm of internet crisis <ul style="list-style-type: none"> • Larger scale of the outbreak • Spread faster and more widely • Larger destruction. The authority of comments even transfers from the enterprise to the Internet users causing greater controversy <p>6.2 Manage crisis of internet public relations</p> <ul style="list-style-type: none"> ◆ Implement the organisation’s established customer relationship management strategy online <ul style="list-style-type: none"> • Establish an accurate sense of crisis • Establish early warning systems for crises • Set up a crisis management team to formulate crisis management plans • Perform simulation training for crisis management • Use public relations tools to build and maintain relationship with the public to get more supporters ◆ Optimise corporate crisis management strategy <ul style="list-style-type: none"> • Pay due attention to the internet media • Timely disclosure of various information on the crisis • Integrate various network resources to consolidate information dissemination • Pay attention to the role of opinion leaders • Pay attention to build internet reputation <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ The internet crisis strategy developed shall not contravene the relevant provisions of the laws of Hong Kong ◆ Work on the details and proactively identify opportunities for improvement
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Understand the characteristics of corporate crisis in the internet environment; ◆ Perform prior warning work before crisis happens; and ◆ Develop and optimize network crisis management strategy.
8. Remark	This UoC is adopted from 107157L4. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Relationship Management’

1. Title	Maintain and improve customer relationship strategy
2. Code	111276L5
3. Range	This unit of competency (UoC) is applicable to the staff responsible for customer relationship management. Practitioners have the ability to provide services to customers in the new era of retail to improve the customer relationship and nurture customer loyalty.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Analyse customer requirements in the new era of retail</p> <ul style="list-style-type: none"> ◆ Provide a full range of information services. Customers need to receive information before making the decision of purchase (e.g. product return and exchange policy, warranty period) ◆ Understand that e-business the new era of retail is a diversified and personalised service which is characterised by different needs for each customer to provide the appropriate information services ◆ Provide a wide range of promotional services (e.g. convenience of online ordering for festival exclusive special offers, allowing customers to choose their preferred method of pickup) ◆ Analyse development of a comprehensive customer relationship strategy <ul style="list-style-type: none"> ● Pre-sales service strategy <ul style="list-style-type: none"> ○ Before the product sales, through the appropriate online and offline channels to provide customers with product introductions, product recommendations, shopping instructions and other information to help customers to make purchase decision ○ Build virtual and/or physical exhibition hall to fully display the product image and to stimulate the desire to purchase ● In-sales service strategy <ul style="list-style-type: none"> ○ In the transaction process, the corporate provides the customers with the convenient product inquiry and shopping guide consultation. Successful purchase could be achieved through product order process, payment process and product distribution services ○ Establish real-time communication system to enhance consumer confidence in online purchase ● After-sales service strategy <ul style="list-style-type: none"> ○ Understand the two types of online after-sales services including 1) basic online product consumption support and technical services, and 2) a variety of addition benefits from corporate to meet the additional needs of customers ○ Analyse and compare the sales service between online and traditional sales process including convenient, flexible, cost effective and direct self-service which enhance the competitiveness of corporate ● Channels of after-sales service, e.g.: <ul style="list-style-type: none"> ○ Provide “Frequently Asked Questions” page to provide relevant product and corporate information that could trigger the interest of customers and help those who have encountered problems in using the products ○ Establish online community over the corporate website to provide real-time communication channel between the after-sales service team and the customers ○ Establish a mailing list for customer registration. Regular email message could be sent to customers to deliver the latest development of corporate so as to strengthen the customer relationship <p>6.2 Maintain and improve customer relationship strategy</p> <ul style="list-style-type: none"> ◆ Identify customers <ul style="list-style-type: none"> ● Collect more customer information through online and offline channels ● Examine and update new customer information and delete old information ◆ Analyse the difference of customers <ul style="list-style-type: none"> ● Identify high-end customers for corporate ● Investigate whether some customers only order one or two products but order a variety of related products from other channels ● Review the customers who have repeatedly launched complaints to the corporate ◆ Maintain good communication with customers <ul style="list-style-type: none"> ● Contact customers from competitors to compare the difference of service standard ● Improve the handling of customer complains

	6.3 Exhibit professionalism <ul style="list-style-type: none"> ◆ Follow the Personal Data (Privacy) Ordinance when dealing with customer information ◆ Keep a balance of interests between corporate and customers
7. Assessment Criteria	The integrated outcome requirements of this UoC are the abilities to: <ul style="list-style-type: none"> ◆ Master the factors and methods to improve customer relations and the demands and characteristics of online customers; ◆ Develop a comprehensive customer relationship strategy; and ◆ Maintain and improve customer relationship strategy.
8. Remark	This UoC is adopted from 107187L5. The UoC title is revised. The QF credit is adjusted from 12 to 6.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Relationship Management’

1. Title	Explore potential requirements of customers
2. Code	111277L5
3. Range	This unit of competency (UoC) is applicable to the staff responsible for customer relationship management. Practitioners have the ability to provide more attractive measures to existing customers and explore their new needs or identify potential customers.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand what is potential customer and the principle to identify potential customers</p> <ul style="list-style-type: none"> ◆ Understand the definition of potential customer and the value they could bring to the corporate ◆ Understand the principles that need to follow to identify potential customers <ul style="list-style-type: none"> • Tailor-made principles: choose to meet the specific needs of potential customers • Focus on the 80/20 principle. Focus on customers with high potential as first priority ◆ Master various online and offline methods to identify potential customers (e.g. customer referral method, influencer marketing) <p>6.2 Explore potential requirements of customers</p> <ul style="list-style-type: none"> ◆ Use different methods to find out the new requirements from existing customers, e.g. <ul style="list-style-type: none"> • Launch special offers regularly for existing customers • Incorporate a navigation element on the regular newsletter with links to the best-selling products of each season • Add keywords regularly that are expected to be popular, and conduct search engine optimisation (SEO), so that customers can easily find what they want ◆ Use different methods to identify potential customers, e.g. <ul style="list-style-type: none"> • Invite existing customers to refer and reward both parties after the referral is successful • Source and engage key persons as customer and then make use of the influencing power of the key persons to accelerate the opportunities to develop potential customers • Invite website visitors to provide email addresses to expand the email list • Use video platform to do online marketing • Make use of keywords to target the potential customers for promotions • Use a variety of specialised market information tools or information provided by the relevant government departments to identify potential customers <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Follow the Personal Data (Privacy) Ordinance when identifying potential customers
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Understand the importance of finding out the new requirements from existing customers and identifying potential customers; and ◆ Master the technique and methods to identify potential customers.
8. Remark	This UoC is adopted from 107188L5. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Relationship Management’

1. Title	Apply technology to support customer relationship management
2. Code	111278L5
3. Range	This unit of competency (UoC) is applicable to the staff responsible for customer relationship management. Practitioners have the ability to understand how to apply technology to support customer relationship management.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Analyse the relevant knowledge of Customer Relationship Management (CRM)</p> <ul style="list-style-type: none"> ◆ Understand reasons of CRM development <ul style="list-style-type: none"> • Pull by demand • Push from technology • Updated management concept ◆ Analyse the concept and characteristics of CRM <ul style="list-style-type: none"> • Comprehensive <ul style="list-style-type: none"> ○ CRM system not only enables corporate to have a flexible and effective customer exchange platform but also enable corporate to integrate the basic capacity to deal with customer business so as to achieve the new customer management model in e-business operation • Integrative <ul style="list-style-type: none"> ○ Integration of CRM system with other corporate system applications (ERP-enterprise resource planning, SCM-supply chain management) integration capabilities. For corporate, true creation of customer value could only be achieved through the full integration of the application systems • Intelligent <ul style="list-style-type: none"> ○ Substantial enhancement of corporate marketing management and user experience by setting a customer relation management system integrating different platforms including one-stop service, internet thinking and big data analysis <p>6.2 Apply technology to support CRM</p> <ul style="list-style-type: none"> ◆ Review the functions of major CRM modules <ul style="list-style-type: none"> • Sales module: assist the corporate to management sales business with major functions including quota management, sales capacity management and regional management. • Marketing module: plan, implement, monitor and analyse marketing activities directly. • Customer relationship module: Enhance the automation and optimisation of the workflow processes relevant to customer supports, on-site services and warehouse management. • Customer interaction module: make use of different online communication channels with customers to promote sales and services ◆ Assess the impact of CRM system on corporate retailing, such as increase of sales, additional costs, etc. <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Keep a balance of interests between corporate and customers during the development of customer relationship strategy
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> • Master the concept and characteristics of CRM system; and • Master and apply the major modules in a CRM system.
8. Remark	This UoC is adopted from 107189L5

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Relationship Management’

1. Title	Analyse, plan and optimise Customer Relationship Management system
2. Code	111279L5
3. Range	This unit of competency (UoC) is applicable to the staff responsible for customer relationship management. Practitioners have the ability to manage Customer Relationship Management (CRM) software to assist corporate to develop and apply effective CRM system.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Analyse the factors for successful CRM</p> <ul style="list-style-type: none"> ◆ Clearly explain to the management of the time, finance and other resources requirements of CRM development ◆ Focus on workflow process but not over focus on technology ◆ Flexible application of technology. Select the suitable technology based on the problems of workflow but not to adjust workflow to fit for technology requirements ◆ Analyse the implementation capability of the CRM team, including: <ul style="list-style-type: none"> • The capability to adjust business workflow • The capability to implement system specialisation and integration • The requests to IT department including network design and data synchronisation etc. • The capacity to change management. ◆ Review human factors <ul style="list-style-type: none"> • In every stage of CRM project, seek supports from different stakeholders such that stakeholders would take up their own responsibility ◆ Develop step-by-step implementation process <ul style="list-style-type: none"> • Through workflow analysis to identify the critical components of the workflow for prior CRM implementation <p>6.2 Analyse, plan and optimise CRM system</p> <ul style="list-style-type: none"> ◆ From the large amount of data generated in the business process and management process of the organisation, select and apply the business intelligence tools within the CRM system for analysis to support the judgment in business management and development. Tools include: <ul style="list-style-type: none"> • Analysis processing tool <ul style="list-style-type: none"> ○ Conduct analysis and processing of the data stored. General options include pre-calculation and real-time calculation • Report query tool <ul style="list-style-type: none"> ○ Fast, simple, easy-to-use query and reporting tools help management to take full advantage of the different levels of data in the corporate to collect information they need and to display the information in a reasonable format • Data mining tool <ul style="list-style-type: none"> ○ Automatically search for any hidden relationship among a large amount of data. Through statistical and analytical processes to explore hidden new information of customers ○ Focus on understanding the business characteristics and transform it into the conditions and parameters for data analysis ○ Convert, clean and import data that can be extracted from multiple data sources and combine to form a valid database ○ Analyse data and build models: organise existing data and use existing models to process data analysis ○ Evaluation and application: excellent assessment method is to use different time periods so that the system could forecast the consumption behavior and then compare the forecast results and the actual situation <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Follow the Personal Data (Privacy) Ordinance when dealing with customer information ◆ Keep appropriate balance of interest between corporate and customers
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Master the professional knowledge of CRM; and

	♦ Develop effective CRM strategy to review and integrate relevant information and data for analysis and set the long-term development direction for the corporate.
8. Remark	This UoC is adopted from 107191L5. The UoC title is revised. The QF credit is adjusted from 12 to 6.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Relationship Management’

1. Title	Manage business partner relationship
2. Code	111280L6
3. Range	This unit of competency (UoC) is applicable to the staff responsible for customer relationship management. Practitioners have the ability to establish and maintain business partner relationship to reduce uncertainty of cooperation and enhance customer satisfaction.
4. Level	6
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Review and set the criteria of selecting business partners, including:</p> <ul style="list-style-type: none"> ◆ Analyse the needs of different business partners <ul style="list-style-type: none"> • Analyse the needs of market competition environment • Analyse the core business and advantages of corporate • Analyse the common interest and potential risks ◆ Identify the type of partnership, for example: <ul style="list-style-type: none"> • Strategic partners • Important partners • General partners ◆ Develop a partner selection process <ul style="list-style-type: none"> • Setup an evaluation team • Preliminary selection of partners • Establish evaluation system and selection method <p>6.2 Manage business partner relationship</p> <ul style="list-style-type: none"> ◆ Build the foundation of trust <ul style="list-style-type: none"> • Strengthen communication and key information exchange • Frequent visits • Data exchange • Achieve concurrent engineering ◆ formulate partnership development strategy, consolidate and maintain partnership <ul style="list-style-type: none"> • Give up dispute • Regularly review the structure and operating system of corporate and partners • Attention to common interests and value • Establish incentive and restraint mechanism <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Implement the partnership management solution that aligns with development requirements of corporate
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Review and develop partnership selection procedures; and ◆ Formulate partnership development strategy.
8. Remark	This UoC is adopted from 107192L6

**Units of Competency for
'Merchandising / E-commerce Merchandising'**

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Merchandising / E-commerce Merchandising’

1. Title	Handle trade documents
2. Code	111281L2
3. Range	This unit of competency (UoC) is applicable to staff responsible for handling trade documents in the retail industry. Practitioners have the ability to handle trade documents under supervision according to the established guidelines and procedures of the organisation to enable smooth transaction of goods.
4. Level	2
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of handling trade documents</p> <ul style="list-style-type: none"> ◆ Possess knowledge of handling general trade documents ◆ Differentiate local and cross-border trade as well as their trade documents ◆ Understand trade-related laws, especially provisions for trade <p>6.2 Handle trade documents</p> <ul style="list-style-type: none"> ◆ Identify different types of trade documents generally used by the organisation: <ul style="list-style-type: none"> • Documents for purchase (e.g. purchasing order, invoice) • Documents for consignment (e.g. bill of lading, airway bill, seaway bill) • Documents for delivery (e.g. arrival notice, delivery order, goods receipt) • Insurance, T/T and documentary credit (e.g. notice of inspection arrangement, insurance policy) • Import licence, customs documents, quota reporting, health certificate, etc. • Invoice on local transaction and documents for payment (e.g. payment advice, payment receipt) ◆ Handle trade documents before deadline according to the established procedures of the organisation, including the procedures of classification, verification and calculation <ul style="list-style-type: none"> • Verify that the cross-border transport arrangement (e.g. by air, by sea, by rail, etc.) is stated in relevant documents • Calculate the extra cost for cross-border transport • Verify that the packaging (e.g. for fragile goods) and shipping method (e.g. wine that needs to be refrigerated all the way) for cross-border transport is stated in relevant documents • File the trade documents processed (manually or electronically); prepare copies for relevant departments / partner organisations when necessary ◆ Report to the superior immediately when having doubts about the content of the trade document, and request the seller to clarify and amend <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Handle trade documents properly before deadline according to the established guidelines and procedures of the organisation ◆ Do not handle or make any change to the trade documents against the rules without authorisation
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Handle trade documents properly before deadline according to the established guidelines and procedures of the organisation to enable smooth transaction of goods; and ◆ Report to the superior immediately when having doubts about the content of the trade document, and request the seller to clarify and amend.
8. Remark	This UoC is adopted from 104959L2.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Merchandising / E-commerce Merchandising’

1. Title	Handle payments for purchases
2. Code	111282L2
3. Range	This unit of competency (UoC) is applicable to staff responsible for purchase payments in the retail industry. Practitioners have the ability to handle the payments to suppliers and creditors under supervision, including local or international suppliers, according to established payment procedures of the organisation. The payment amount should not exceed the job authority.
4. Level	2
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of handling payment for purchases</p> <ul style="list-style-type: none"> ◆ Understand the payment procedures and policy of the organisation ◆ Master the payment record system of the organisation ◆ Possess basic knowledge of local and international payment, including: <ul style="list-style-type: none"> • Taxes • Payment method • Payment terms • Invoice and payment procedures ◆ Master the internal payment system (electronic and text files) <p>6.2 Handle payments for purchases</p> <ul style="list-style-type: none"> ◆ Follow the organisational procedures and guidelines to check the accuracy of delivery note and invoice ◆ Review invoice and unsettled payment record to look for and rectify discrepancies ◆ Master the methods of purchase payment such as: <ul style="list-style-type: none"> • Cash • Cheque • Electronic transfer (T/T, SWIFT) ◆ Prepare payment-related documents ◆ Seek payment authorisation from designated personnel ◆ Make payment and update the internal record according to the organisation’s procedures <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Payment should be made in correct amount according to the organisation’s procedures ◆ Ensure compliance with the code of ethics when handling payment in order to prevent any act of theft
Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Check the accuracy of invoice and seek payment authorisation from relevant personnel; and ◆ Handle the payment for purchases in an appropriate way and update the internal record according to the organisation’s procedures.
8. Remark	This UoC is adopted from 104962L2.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Merchandising / E-commerce Merchandising’

1. Title	Implement the purchase
2. Code	111283L3
3. Range	This unit of competency (UoC) is applicable to staff in the purchasing department of a retail organisation. Practitioners have the ability to choose suitable suppliers in order to purchase suitable goods in right quantities from them according to established purchasing procedures of the organisation and limits of authority of the relevant post.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of purchasing</p> <ul style="list-style-type: none"> ◆ Master the latest information on the price, market demand and market share of different goods ◆ Understand the cost structure of goods in order to negotiate with the suppliers for marginal returns ◆ Understand the legislation on the standard and sales of goods (e.g. Trade Descriptions Ordinance) ◆ Master the required specifications and inventory of different goods ◆ Master the documents and handling method of the company for purchase ◆ Understand the procedures for selecting suppliers of different goods ◆ Monitor the trends and specifications of environmental products for consumer choice ◆ Master the environmental purchasing concept and its application <p>6.2 Implement the purchase</p> <ul style="list-style-type: none"> ◆ Confirm what goods to be purchased according to established purchasing procedures and limits of authority of the relevant post ◆ Explain to / discuss with the supplier about the marketing plan according to the advantage of the organisation ◆ Confirm the supplier of goods needed according to the established supplier selection procedures ◆ Purchase from selected suppliers according to established strategies, including: <ul style="list-style-type: none"> • Supply agreement • Confirming the specifications and quantity of different goods • Purchase price and cycle • Handling suppliers' requests ◆ Understand storage methods for goods ◆ Collect quotation information for comparison and analysis, and make a purchase according to the sales targets set by the organisation ◆ Review the types and ranges of goods according to the sales targets set by the organisation ◆ Provide suggestions to superiors for adjustments and optimisation in planning and developing the types of goods ◆ Follow all relevant laws (e.g. comply with the Prevention of Bribery Ordinance, no bid rigging in the purchasing process) <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Follow the organisation's established purchasing procedures and limits of authority of the relevant post to prevent any abuse or malpractice such as misappropriation of organisational assets and theft, etc. ◆ Protect the benefit of the organisation during the purchase of goods
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Implement the purchase of goods effectively according to the organisation's established purchasing procedures; and ◆ Handle purchase-related documents properly (e.g. quotations, purchase orders).
8. Remark	This UoC is adopted from 104963L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Merchandising / E-commerce Merchandising’

1. Title	Introduce products
2. Code	111284L3
3. Range	This unit of competency (UoC) is applicable to staff handling goods in the retail industry. Practitioners have the ability to introduce to employees of different positions the detailed information and characteristics of the product purchased by the organisation, so that they can sell it to customers more successfully in their respective working area.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of introducing products</p> <ul style="list-style-type: none"> ◆ Understand different channels and methods of communicating with colleagues ◆ Understand different channels and methods of promoting products ◆ Master the detailed information and characteristics of the product purchased by the organisation ◆ Understand the corporate plan of launching the product and the responsibilities of different departments, and possess knowledge of the product ◆ Understand the organisation’s procedures of launching the product and the support required <p>6.2 Introduce products</p> <ul style="list-style-type: none"> ◆ Provide relevant departments and employees with the latest information and characteristics of the product after purchasing it, such as: <ul style="list-style-type: none"> • Features attractive to customers (particularly appliances or audio-visual products) • Characteristics edged over other similar products (particularly electronic or computer products) • Correct operation /use of the product • Suggested retail price (if applicable) • Maintenance period / expiry date, etc. (durables) • Most trendy of its kind (e.g. apparels) • Appropriate storage condition (e.g. the temperature and humidity) / method before putting on sale ◆ Provide relevant employees and departments with necessary training to ensure that they possess product knowledge and know how to operate it ◆ Prepare printed/training materials or promotional leaflets for product introduction activities if necessary ◆ Recommend on how to improve the methods and channels of introducing products to employees ◆ Evaluate the result of product introduction activities (e.g. whether the employees can sell the product to customers successfully) <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Introduce the product according to its actual information/ characteristics without exaggerating its functions / use ◆ Refer to the Trade Descriptions Ordinance to ensure the product introduction complies with the legal requirements
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Introduce to employees of different positions the detailed information and characteristics of the product; and ◆ Enable the employees to sell it to customers more successfully in their respective working area.
8. Remark	This UoC is adopted from 104970L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Merchandising / E-commerce Merchandising’

1. Title	Buy goods
2. Code	111285L3
3. Range	This unit of competency (UoC) is applicable to the purchasing department of the retail industry. Practitioners have the ability to master the organisation’s purchasing needs and buy quality goods with the most favourable price.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of buying goods</p> <ul style="list-style-type: none"> ◆ Understand the corporate policy on buying goods / sales target ◆ Master the supplier relationship management skills ◆ Master the contract negotiation skills ◆ Understand factors affecting the buying of goods, such as: <ul style="list-style-type: none"> • Sales condition of the goods • Seasonal and market trends • Inventory policy • Sales activities of competitors • Publicities and other business activities ◆ Master the skills in evaluating product performance / quality ◆ Know about job ethics and code of conduct for purchasing <p>6.2 Buy goods</p> <ul style="list-style-type: none"> ◆ Identify purchasing needs ◆ Make a purchase plan according to the purchasing needs, including: <ul style="list-style-type: none"> • Product description • Quantity • Requirement date • Estimated cost • Supplier type • Local or international goods ◆ Select suitable suppliers and make orders to them ◆ Coordinate to deliver the goods to warehouse or directly to retail shops <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Maintain good partnership with suppliers ◆ Comply with guidelines related to buying goods and adhere to the job ethics ◆ Prevent any abuse of power or malpractice, such as abuse / misappropriation of the organisational assets and theft
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Master the purchasing needs of the organisation; and ◆ Buy quality goods for the organisation with the most favourable price.
8. Remark	This UoC is adopted from 104971L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Merchandising / E-commerce Merchandising’

1. Title	Implement quality control of goods
2. Code	111286L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for quality control in the retail industry. Practitioners have the ability to implement quality control of goods to ensure that the quality of incoming and outgoing goods is up to standard.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of quality control</p> <ul style="list-style-type: none"> ◆ Understand the quality control policies and procedures of the organisation ◆ Understand quality control methods and techniques, including <ul style="list-style-type: none"> • Sampling • Inspection • Testing ◆ Understand points to note for quality control e.g. <ul style="list-style-type: none"> • Related legal requirements in Hong Kong • Related international testing requirements • Define tolerable amount of problem goods for different quality problems • Date of validity • Label (e.g. usage, types of materials, usage instructions, warnings, etc.) • Package condition (e.g. damaged, with cracks, etc.) • Production certificate • Safety and health regulations and related legal requirements ◆ Understand related occupational safety and health and related regulations <p>6.2 Implement quality control of goods</p> <ul style="list-style-type: none"> ◆ Assess the quality assurance management system of the supplier to see if it fulfils the requirements when purchasing goods ◆ Before receiving goods, obtain the outgoing quality inspection report from the supplier ◆ Implement tasks related to quality control in accordance with the established quality control guidelines and procedures of the organisation <ul style="list-style-type: none"> • Peruse detailed information of the goods (e.g. type of goods, quantity, need for special treatment) • Quality assurance requirements • Specific safety requirements ◆ Implement quality control of goods before storage in accordance with the guidelines and standards of quality of the organisation and related legal requirements <ul style="list-style-type: none"> • Verify documents related to the inventory (voucher, label, delivery note, consignment note of the supplier) • Observe visually to ensure the goods are free from any damage during the consignment • Implement sampling, inspection and testing • Complete the inspection reports required in accordance with established procedures ◆ Implement the following before delivery of goods: <ul style="list-style-type: none"> • Check delivery documents (e.g. delivery order, records) • Observe visually or conduct sample checking to ensure that the goods are flawless and up to standard (e.g. any damaged package, product temperature (if applicable) or product volume) • Use product package to ensure that the products will be free from any damage during loading, unloading and the conveyance process • Choose appropriate conveyance (e.g. refrigerated vehicle) in accordance with the nature and type of goods • Complete the inspection reports required in accordance with established procedures ◆ Store goods in accordance with related quality control guidelines, reject or return goods that are not up to standard, and record and report quality control results <p>6.3 Exhibit professionalism</p>

	<ul style="list-style-type: none"> ◆ Ensure that the quality of incoming and outgoing goods is up to standard when carrying out quality control of goods
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Implement quality control of goods in accordance with the established quality control guidelines and procedures of the organisation; and ◆ Record quality inspection reports and related documents for incoming and outgoing goods accurately, and file them.
8. Remark	This UoC is adopted from 104972L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Merchandising / E-commerce Merchandising’

1. Title	Handle problems with suppliers
2. Code	111287L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for contacting suppliers in the retail industry. Practitioners have the ability to state the problem to the supplier and resolve the problem by negotiation independently when goods have special condition / problem and the supplier is found responsible.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of handling problems of goods purchased</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s policies on goods purchased (e.g. packaging, expiry date of goods, etc., as well as common problems and the corresponding solutions and procedures) ◆ Understand the organisation’s management policies on suppliers ◆ Master team spirit, coordination ability and interpersonal communication ability (through words and language) in order to facilitate communication with suppliers ◆ Master the techniques of analysing problems, resolving problems and collecting information about the problem, etc. ◆ Understand the procedures for reporting problems to suppliers, and possess knowledge of using internal problem report tracking system (by paper or computer) ◆ Understand the methods and procedures for inspection of goods <p>6.2 Handle problems with suppliers</p> <ul style="list-style-type: none"> ◆ Analyse details of the problem goods in accordance with the policies / guidelines formulated by the organisation ◆ Confirm if the problem originated from the organisation itself or it was the responsibility of the supplier ◆ Collect important evidences of the problem goods and submit them to the supplier ◆ Retrieve detailed information from the system that keeps record of the supplier such as contact person, contractual terms, and statements; and contents required for submitting the problem ◆ Complete the internal “Report on Problems of Suppliers” according to the established guidelines of the organisation, which can be an online / a tracking system record or by filling out a form, and keep record of written documents on evidence collected ◆ Submit the report to the supplier and request for follow-up actions ◆ Follow up and negotiate with the supplier to resolve problems related to the goods ◆ Analyse the performance of different suppliers and implement quality management ◆ Review the incident and identify sources of problems to avoid recurrence of similar problems <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Adhere to the organisation’s management policies on suppliers ◆ Prevent any abuse of power or malpractice, such as abuse / misappropriation of the organisational assets and theft
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Clearly illustrate problem areas of goods provided by the supplier; ◆ Collect evidence and request the supplier to take follow-up actions, and resolve problems by negotiation; and ◆ Record and save related documents and reports according to the guidelines of the organisation.
8. Remark	This UoC is adopted from 104978L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Merchandising / E-commerce Merchandising’

1. Title	Establish partnerships with suppliers
2. Code	111288L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for contacting suppliers in the retail industry. Practitioners have the ability to introduce appropriate suppliers for products / services of the organisation and establish partnerships with them according to the policies, rules and operation of the organisation.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of establishing partnership</p> <ul style="list-style-type: none"> ◆ Understand the purpose and effect of introducing new suppliers on the existing supplier group ◆ Master the purpose and conditions of establishing partnerships with suppliers ◆ Understand common problems / difficulties when cooperating with suppliers ◆ Understand the techniques of establishing good partnerships with suppliers ◆ Understand the needs, priorities and concerns of the suppliers in order to develop a win-win partnership ◆ Master the negotiation skills <p>6.2 Establish partnerships with suppliers</p> <ul style="list-style-type: none"> ◆ Find appropriate suppliers for the products / services of the organisation, and set common goals for the development of the organisation and the suppliers ◆ Negotiate with different suppliers and strive for the most favourable terms for the organisation when entering a partnership with suppliers ◆ Use measurable methods to formulate partnership plans with suppliers ◆ Formulate related conditions and points to note when establishing partnership agreements with suppliers e.g. <ul style="list-style-type: none"> • Service level / product specifications • Delivery of product (lead time) • Service time / level of service supplied • Sharing client feedback • Market information • Purchase support ◆ Conduct survey on clients’ satisfaction level or response after introducing a supplier, and develop respective key performance indicators (KPI) ◆ Communicate with the quality control department to assist in monitoring the quality of products supplied by the supplier ◆ Monitor the performance of the supplier continuously and review the partnership plan regularly ◆ Contact the supplier regularly to review the partnership and formulate supply chain optimisation solutions <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Establish good partnerships with suppliers on the basis of mutual trust and by adhering to the policies and requirements of the organisation ◆ Enter a partnership with a supplier with the prerequisite that the benefit of the organisation will not be harmed, in order to achieve a win-win situation ◆ Prevent any abuse of power or malpractice, such as abuse / misappropriation of the corporate assets and theft
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Introduce appropriate suppliers for the organisation, establish good partnerships and formulate partnership plans with suppliers; and ◆ Monitor the performance of suppliers continuously and review the partnership plans regularly.
8. Remark	This UoC is adopted from 104979L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Merchandising / E-commerce Merchandising’

1. Title	Import goods
2. Code	111289L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for the purchase and supply chain in the retail industry. Practitioners have the ability to import goods for retail, which includes the purchase, inventory method and sales of goods.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of importing goods</p> <ul style="list-style-type: none"> ◆ Understand the corporate policy for purchasing imported goods ◆ Know about the corporate business objectives ◆ Master the negotiation skills for international purchase agreement ◆ Master the procedures of importing goods, including: <ul style="list-style-type: none"> • Product study and tender invitation • Collecting samples • Negotiation • Order and delivery management ◆ Master the customs ordinances and regulations related to imports ◆ Understand the purchasing ethics and code of conduct <p>6.2 Import goods</p> <ul style="list-style-type: none"> ◆ Communicate and coordinate with internal departments to confirm the purchasing needs ◆ Analyse the reasons for the need of importing goods, such as: <ul style="list-style-type: none"> • Product’s uniqueness • Brand • New market • Bigger profit ◆ Purchase imported products <ul style="list-style-type: none"> • Check the supplier’s proof, including: <ul style="list-style-type: none"> ○ Reputation ○ Experience in export trade ○ quality ○ Health certificate / laboratory reports ○ Service attitude • Master the supplier’s quality assurance system • Negotiate and arrange with the supplier on the goods delivery method • Agree on the minimum order quantity of goods, minimum quantity order and pay-on-delivery guarantee • Complete the necessary customs procedures for the imports, or outsource the process to agents ◆ Coordinate with internal departments / retail units to receive the goods ◆ Track the delivery status of goods and check the quality of goods upon delivery <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Comply with the legal requirements on logistics transport, warehousing, customs and bonded goods when importing goods ◆ Prevent any abuse of power or malpractice
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Master the organisation’s requirements on goods purchase; and ◆ Source international suppliers with stable supplies and coordinate the entire import process with internal departments to ensure that the goods are delivered to the appropriate retail units.
8. Remark	This UoC is adopted from 104980L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Merchandising / E-commerce Merchandising’

1. Title	Manage relationships with suppliers
2. Code	111290L5
3. Range	This unit of competency (UoC) is applicable to the purchasing department of the retail industry. Practitioners have the ability to analyse and assess suppliers’ information, and manage relationships with suppliers including management of purchase agreement, resolution of conflicts, and monitoring of suppliers, in order to ensure that the delivery of goods is correct in quantity and punctual.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of supplier management</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s procedures and policy guidelines related to purchasing, tender invitation, and contract signing (including limit of authority and monitoring measures) ◆ Understand the organisation’s guidelines on supplier selection ◆ Understand the organisation’s policies and guidelines on contract negotiation ◆ Understand methods of monitoring and assessing performance of suppliers ◆ Understand by what method/mechanism the organisation uses to monitor the quality of goods provided by suppliers <p>6.2 Manage relationships with suppliers</p> <ul style="list-style-type: none"> ◆ Analyse and classify suppliers e.g. <ul style="list-style-type: none"> • Scale of the organisation • Types / quality of goods provided • Business expansion • Background ◆ Analyse suppliers’ production costs and evaluate the production condition in order to formulate appropriate purchasing strategies ◆ Regularly update changes in suppliers’ organisation information ◆ Understand suppliers’ organisation structure, decision making process, etc. ◆ Assess suppliers’ financial risks and their sustainability and formulate corresponding strategies and contingency plans ◆ Increase transparency in tender invitations or contract negotiations to ensure a mutual understanding of all contractual terms and conditions. ◆ Monitor suppliers’ performance and give opinions on the following to improve cooperative relationship <ul style="list-style-type: none"> • Quality of goods • Delayed delivery • Arrangement for return of goods • Understand terms for return of goods (e.g. the return is due to problems related to transportation / packaging, etc.) • Faulty invoices ◆ Establish communication channels with suppliers and maintain good cooperative relationship <ul style="list-style-type: none"> • Respect • Trust • Justice and integrity • Mutual benefits • A business partner <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that benefits of the organisation will not be harmed, which is a prerequisite when entering a partnership with suppliers, in order to achieve a win-win situation ◆ Ensure that professional conduct has been upheld in the cooperative relationship with suppliers ◆ Prevent any abuse of power or malpractice, such as abuse / misappropriation of the organisational assets and theft

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Master the business characteristics of suppliers; and ◆ Manage relationship with suppliers effectively, and establish sound communication channels with suppliers for mutual benefits.
8. Remark	This UoC is adopted from 104982L5. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Merchandising / E-commerce Merchandising’

1. Title	Negotiate a contract
2. Code	111291L5
3. Range	This unit of competency (UoC) is applicable to purchasing or related departments of the retail industry. Practitioners have the ability to negotiate contracts effectively, and prepare contract terms to protect the benefit of the organisation in buying products or services. Comment on or confirmation of contract requires the organisation’s approval, and the contract amount should not exceed the limits of authority of the post.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of contract negotiation</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s policies and procedures for purchasing, tendering and contracting ◆ Understand the business law and relevant international conventions, regulations and legislations ◆ Understand various modes of cooperation with suppliers and their characteristics ◆ Understand standard contract terms and the principle of formulating them ◆ Master the skills in managing the suppliers <p>6.2 Negotiate a contract</p> <ul style="list-style-type: none"> ◆ Analyse the contract details for product and service bought (e.g. shop / showroom for lease) ◆ Analyse the cooperation mode of and the relationship between the organisation and the supplier ◆ Analyse the operation risks of the organisation ◆ Set the baseline for negotiation concerning the range of service and its limitations, operation risks of the organisation, etc. ◆ Consider various factors, including difference of products or services, legal requirements, best practice of the trade, etc., during negotiation ◆ Communicate with internal departments to master contract requirements for different operational procedures ◆ Make use of the negotiation environment / negotiation skills / negotiation strategy / number of negotiators in order to achieve a win-win situation ◆ Specify and understand the risks and liabilities for breaching the contract ◆ Make preparation before negotiation, such as knowing one’s own advantage, whether there is alternative product or service, how to meet the needs of the other side, etc. ◆ Comments on or confirmation of the contract will only be effective upon the approval of an authorised person <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Comply with relevant legislation and job ethics in the contract negotiation process ◆ Ensure that the contract is negotiated for the benefit of the organisation
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Use communication skills to understand the goals expected by both sides to the contract; and ◆ Use the negotiation skills to fight for favourable terms for and protect the benefit of the organisation, and to prepare contract terms to express the wishes of both sides.
8. Remark	This UoC is adopted from 104983L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Merchandising / E-commerce Merchandising’

1. Title	Plan a purchasing system
2. Code	111292L5
3. Range	This unit of competency (UoC) is applicable to product purchase / product-related departments of the retail industry. Practitioners have the ability to effectively plan, implement and handle the purchase of goods related to the organisation’s business, by means of direct purchase, bidding, auction, telephone hotline, postal service and business promotion activities.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of purchase of goods</p> <ul style="list-style-type: none"> ◆ Understand the importance of purchase of goods to retail business operation and to the overall profit of the organisation ◆ Understand related guidelines and procedures of the organisation, and regulate all activities of purchase of goods ◆ Understand legislation related to purchase of goods established by the government ◆ Master detailed background and information of product suppliers of the organisation <p>6.2 Plan a purchasing system</p> <ul style="list-style-type: none"> ◆ Establish purchasing guidelines and procedures for the organisation ◆ Ensure that the responsible staff implement the established guidelines and procedures ◆ Consolidate information of all suppliers, including their background, reputation, network, previous business dealings and track record ◆ Use relevant information and user feedback obtained from the supplier to compile information to evaluate the supplier ◆ Understand thoroughly through different channels the services provided by suppliers in order to look for an appropriate supplier ◆ After evaluating information from different sources (e.g. proposals, impression from meeting, reputation, track records), make decision on supplier selection ◆ Negotiate the terms with the supplier to strive for the best interests of the organisation ◆ Set key service standards for the supplier, sign the agreement and assess regularly ◆ Monitor supplier’s performance and see if the supplier complies with legal regulations so as to reduce the risk of the organisation ◆ Follow up and handle supplier’s poor performance and regulatory violations that have been confirmed in providing service <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Adhere to relevant guidelines and procedures of the organisation when handling the purchase of goods ◆ Ensure all goods purchasing activities comply with the requirements of commercial law ◆ Prevent any abuse of power or malpractice, such as abuse/misappropriation of the organisational assets and theft
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Implement related purchase of goods effectively according to the organisation’s guidelines on purchase of goods; and ◆ Monitor and evaluate suppliers’ performance and review the cooperative relationship with them.
8. Remark	This UoC is adopted from 104989L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Merchandising / E-commerce Merchandising’

1. Title	Purchase goods
2. Code	111293L5
3. Range	This unit of competency (UoC) is applicable to the purchasing department of the retail industry. Practitioners have the ability to implement purchase of existing or newly launched products; negotiate contract with suppliers in order to purchase quality guaranteed goods with the most favourable price and earn higher profits for the organisation.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Analyse the knowledge of goods purchase</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s purchasing policies and strategies ◆ Analyse the organisation’s business goals ◆ Understand the importance of the relationship with suppliers ◆ Master the negotiation skills ◆ Master the technique of quantitative analysis for retail, including: <ul style="list-style-type: none"> • Demand analysis • Supply analysis • Community analysis ◆ Analyse the market trend and competitors’ business strategies ◆ Understand the ethics and code of practice for purchasing ◆ Understand legal requirements related to purchase of goods <p>6.2 Purchase goods</p> <ul style="list-style-type: none"> ◆ Determine the types of goods to be purchased by analysing different factors, including: <ul style="list-style-type: none"> • Market trend • Sales statistics of the retail store • Inventory level • Competitor’s business activities • Product trend ◆ Be familiarise with the functions, size, colour and materials of the goods ◆ Source goods required through different channels, including: <ul style="list-style-type: none"> • Organisation’s partner / supplier list • Global purchasing database • Goods exhibition • Internet • Supplier • Supplier’s promotional information • Recommendations from industry peers ◆ Request product samples from suppliers for preview ◆ Make a product evaluation list with verification points for checking ◆ Coordinate with the purchasing department for purchasing goods needed by the organisation ◆ Coordinate the negotiation and contract formulation process <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Maintain good partnerships with suppliers ◆ Comply with related legal requirements and job ethics when purchasing goods ◆ Prevent any abuse of power or malpractice, such as abuse / misappropriation of the organisational assets and theft
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Master the organisation’s need for goods purchase; and ◆ Source goods required by the organisation through different channels and negotiate contract matters with suppliers.
8. Remark	This UoC is adopted from 104990L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Merchandising / E-commerce Merchandising’

1. Title	Research and analyse the latest life trends and design trends; plan, design and implement creative visual merchandising strategies
2. Code	111294L5
3. Range	This unit of competency (UoC) is applicable to retail procurement and data analytics. Practitioners have the ability to make use of various online and offline channels to deliver brand messages to customers and increase the success rate of sales.
4. Level	5
5. Credit	4 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Analyse the knowledge of creative visual merchandising</p> <ul style="list-style-type: none"> ◆ Understand that creative visual merchandising is not confined to brick-and-mortar, but also applies to online marketing and hybrid marketing (e.g. pop-up stores, interstitials, game alliances) ◆ Understand that creative visual merchandising is to communicate with customers through strategic product display (e.g. lighting, colours, space) ◆ Analyse that creative visual merchandising can help the brand personality and characteristics shine, which can effectively differentiate from competitors, thereby building customer loyalty to the brand and allowing the brand to charge higher prices for its products <p>6.2 Research and analyse the latest life trends and design trends; plan, design and implement creative visual merchandising strategies</p> <ul style="list-style-type: none"> ◆ Research and analyse the latest life trends <ul style="list-style-type: none"> • The relationship between life trends come from social issues (e.g. no age limit, recyclable materials) and the brand with its products • With the popularity of voice search and smart speakers, content readability and aesthetics are equally important, while visual effects / images have the same weight as advertising text ◆ Research and analyse the latest design trends <ul style="list-style-type: none"> • Graphic design • 3D installation • Animation and interaction design ◆ Plan, design and implement creative visual merchandising strategies <ul style="list-style-type: none"> • Clarify the focus of each creative visual merchandising strategy (e.g. building brand awareness, clearance sale) • Create and deliver valuable content to promote the brand so as to build good relations with the public • Provide clear direction and specific guidelines for product display to improve sales success rate • Provide seamless shopping experience across online and offline channels • Use the data collected from each touchpoint to adjust strategies resiliently <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Comply with related legal requirements and job ethics when planning and designing strategies ◆ Make good use of various online and offline channels to implement creative visual merchandising strategies
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Grasp the latest life trends and design trends; plan and design appropriate creative visual merchandising strategies for the brand; ◆ Provide direction and guidelines for product display in various online and offline channels; and ◆ Review the effectiveness of creative visual merchandising strategies on a regular basis and make adjustments as needed.
8. Remark	

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Merchandising / E-commerce Merchandising’

1. Title	Manage international purchasing
2. Code	111295L6
3. Range	This unit of competency (UoC) is applicable to supervisory and management staff responsible for purchase of goods in the retail industry. Practitioners have the ability to supervise and manage international purchasing activities by their broad international horizons and profound expertise in purchasing in order to promote the development of the retail business of the organisation.
4. Level	6
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Have expert knowledge of international purchasing</p> <ul style="list-style-type: none"> ◆ Fully master professional knowledge of purchasing ◆ Have expert knowledge of the organisation’s requirements of the quality and standard of different types of goods including foreign goods ◆ Understand the latest information of international materials supply and sales markets ◆ Understand the relationship between new information of the retail market and overall purchasing international purchasing plan ◆ Have expert knowledge of local and international ordinances and regulations related to purchasing <p>6.2 Manage international purchasing</p> <ul style="list-style-type: none"> ◆ Formulate an overall international purchasing plan and performance indicators, including: <ul style="list-style-type: none"> • Formulate international purchasing procedures • Regularly review and improve international purchasing model • Formulate international purchasing specifications and terms • Monitor the smooth implementation of the overall international purchasing plan ◆ Formulate selection guidelines according to the organisation’s purchasing strategies to select appropriate overseas suppliers ◆ Instruct and monitor subordinates to collect and organise overseas supplier information such as quality of goods or their financial condition, etc. ◆ Master overseas trade regulations such as export control or tariff, etc. ◆ Formulate the organisation’s payment method for international purchasing, including: <ul style="list-style-type: none"> • Hedging • Letter of credit • Payment by cheques (offshore or onshore) • Exchange of goods / offset trade, etc. ◆ Strive for discounts/benefits from sellers/suppliers trading on a long-term basis ◆ Introduce green (environmental) purchasing concept and measures into international purchasing ◆ Ensure that immediate remedial measures will be taken when problems occur in international purchasing, e.g. <ul style="list-style-type: none"> • Failure of overseas suppliers in providing goods agreed in time • Delay in transportation • Goods not corresponding to description (unable to pass quality inspection) • Fluctuation of foreign currency • Other problems e.g. strike, war <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Adhere to the organisation’s established procedures of international purchasing activities and the purchasing authority ◆ Protect the benefits of the organisation in international purchasing management ◆ Prevent any abuse of power or malpractice, such as abuse / misappropriation of the organisational assets and theft

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Properly manage the international purchasing activities of the organisation by their broad international horizons and profound knowledge in purchasing; and ◆ Implement international purchasing plans and performance indicators to promote the development of the retail business of the organisation.
8. Remark	This UoC is adopted from 104993L6.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Merchandising / E-commerce Merchandising’

1. Title	Formulate purchasing strategy
2. Code	111296L6
3. Range	This unit of competency (UoC) is applicable to the purchasing department of the retail industry. Practitioners have the ability to evaluate the purchasing resources and effectiveness of the organisation in order to formulate a purchasing strategy to promote the retail business development and reduce excess inventory so as to achieve maximum investment return.
4. Level	6
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Integrate different purchasing knowledge and principles, and formulate purchasing strategy related knowledge based on the organisation’s business strategy</p> <ul style="list-style-type: none"> ◆ Master the organisation’s business strategies ◆ Understand the importance of purchasing strategy ◆ Master different parts of knowledge in purchasing, e.g.: <ul style="list-style-type: none"> • Optimising supplier • Total Quality Management (TQM) • Risk management • Global purchasing • Environmental purchasing • Supplier development ◆ Understand the concept of product category, including: <ul style="list-style-type: none"> • Consumer decision tree • Sales space and resources allocation • Role and strategy of product ◆ Master the application of the five rights principle of purchasing, namely: <ul style="list-style-type: none"> • The right supplier • The right price • The right quantity • The right quality • The right time ◆ Master the importance of payment method and capital flow to purchasing strategy ◆ Master the purchase cycle procedure ◆ Know about laws and legal requirements related to purchasing <p>6.2 Formulate purchasing strategy</p> <ul style="list-style-type: none"> ◆ Confirm purchasing strategy in order to support the organisation’s overall business, e.g. economical purchasing, centralised purchasing, quality management, etc. ◆ Analyse the sales and inventory record of retail products to ensure adequate supply without overstocking ◆ Analyse the organisation’s purchasing process to ensure its effectiveness, e.g. the effect on operation needs, the relationship with suppliers, criteria for purchasing, etc. ◆ Conduct Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis and competitive analysis to strengthen the competitiveness of the retail products in the stores (e.g. promotions, pricing, location, etc.), so as to achieve better sales than the competitors ◆ Look for an appropriate new purchasing method e.g. e-purchasing ◆ Formulate a new purchasing strategy according to the organisation’s business strategies, the “five rights” purchasing criteria and the legal requirements, and confirm the support of manpower, financial and other resources ◆ Formulate key performance indicators (KPI) to measure the effectiveness of the purchasing process ◆ Formulate purchasing system, review the purchasing strategy and measures to prevent abuse of power or malpractice <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the purchasing strategy is for the benefit of the organisation ◆ Adhere to related legal requirements and job ethics when formulating purchasing strategy

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Formulate an effective purchasing strategy to meet the organisation's overall business need; ◆ Formulate KPI for purchasing to measure the effectiveness of the purchasing process; and ◆ Formulate a purchasing system, review purchasing strategy and measures to prevent malpractice for personal gain.
8. Remark	This UoC is adopted from 104994L6. The QF credit is adjusted from 9 to 6.

Units of Competency for 'Supply Chain Management'

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Handle commonly-used shipping documents
2. Code	111297L1
3. Range	This unit of competency (UoC) is applicable to staff in the logistic department of a retail organisation. Practitioners have the ability to handle commonly-used shipping documents according to the established procedures of the organisation.
4. Level	1
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of handling logistics documents</p> <ul style="list-style-type: none"> ◆ Understand various types of documents to be handled in daily logistics operation, including: <ul style="list-style-type: none"> • Documents related to purchase and goods (e.g. purchasing order, invoice) • Documents for consignment (e.g. bill of lading, master airway bill/house airway bill, seaway bill) • Documents for local transport (e.g. arrival notice, delivery order, cargo receipt) • Inspection, insurance and documentary credit (e.g. notice of inspection arrangement, insurance policy) • Invoice on local transaction and documents for payment (e.g. payment advice, payment receipt) ◆ Understand the handling procedures of relevant electronic documents ◆ Understand the legal responsibilities of various types of electronic documents ◆ Know how to operate software of the organisation to handle relevant electronic documents <p>6.2 Handle commonly-used shipping documents</p> <ul style="list-style-type: none"> ◆ Use relevant templates to prepare documents needed in each logistics operation procedure according to the requirements of the organisation and relevant units ◆ Send the prepared documents to relevant units ◆ Receive electronic documents from relevant units and handle them according to procedures ◆ Input relevant data of the electronic documents to the documentation system ◆ Copy and save the documents according to the procedures of the organisation <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the shipping documents are handled properly before deadline according to the established guidelines and procedures of the organisation ◆ Do not handle or make any change to the shipping documents against the rules without authorisation
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Ensure that the commonly-used shipping documents are handled under supervision before deadline according to the established guidelines of the organisation.
8. Remark	This UoC is adopted from 104956L1.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Receive goods for storage
2. Code	111298L1
3. Range	This unit of competency (UoC) is applicable in distribution centres or warehouses of the retail industry. Practitioners have the ability to receive and take record of goods according to the procedures of the organisation in predictable and regular situations.
4. Level	1
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of handling goods</p> <ul style="list-style-type: none"> ◆ Understand the policies and procedures of the organisation for storing goods ◆ Understand the documents for receiving goods ◆ Know about the inventory mechanism of the organisation ◆ Understand the infrastructure of distribution centre or warehouse ◆ Understand the storage procedures for goods received ◆ Understand the storage requirements of goods to be stored, including: <ul style="list-style-type: none"> • Temperature • Lighting • Fragility • Humidity • Handling of dangerous goods (e.g. alcoholic goods, LPG goods)First-in first-out or other methods • Security ◆ Understand taxable goods (e.g. goods need to be taxed upon withdrawal) ◆ Understand the occupational safety and health guidelines of the organisation <p>6.2 Receive goods for storage</p> <ul style="list-style-type: none"> ◆ Check the shipping document and cross check the order code, description, quantity, packing specifications, etc. with the purchase record ◆ Check the readability of the bar code (or other scannable labels) ◆ Discharge the goods and inspect them for damage ◆ Take appropriate steps to handle damaged goods e.g.: <ul style="list-style-type: none"> • Separating the damaged goods from the intact ones • Notifying the supplier • Preparing a notification for returning goods • Arranging transportation • Notifying a claim adjuster, if necessary, for a third party record ◆ Store goods received according to the procedures of the organisation and the storage requirements for the labels, temperature, humidity, safety, storage location, etc. ◆ Update the inventory record according to the procedures of the organisation ◆ Save and maintain all documents related to the goods received according to the procedures of the organisation <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Receive goods for storage according to relevant occupational safety and health regulations and guidelines ◆ Prevent any malpractice, such as theft
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Check the documents and complete necessary procedures for storing goods according to the procedures of the organisation; and ◆ Record information on goods stored and make sure the inventory record is correct.
8. Remark	This UoC is adopted from 104957L1.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Package goods in distribution centres
2. Code	111299L1
3. Range	This unit of competency (UoC) is applicable to staff handling goods in retail distribution centres or warehouses. Practitioners have the ability to handle goods, including but not limited to those of the organisation, under supervision in distribution centres according to established requirements; and package goods according to their nature for subsequent transport and sale.
4. Level	1
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of packaging goods, tools and machinery</p> <ul style="list-style-type: none"> ◆ Know about the goods manufactured/purchased by the organisation and different goods that need to be packaged ◆ Know about different packaging needs for various kinds of goods ◆ Distinguish labels of various kinds of goods ◆ Understand the established code of practice/procedures of the organisation for packaging goods ◆ Understand the operation of various types of packaging tools and machinery ◆ Master the basic skills in packaging goods <p>6.2 Package goods in distribution centres</p> <ul style="list-style-type: none"> ◆ Package goods actually in the workplace, warehouses or distribution centres ◆ Package goods according to their respective natures, such as: <ul style="list-style-type: none"> • Shape / volume / weight • Stacking method • Food/non-food • Fragile goods • Packaging strength / toughness requirement • Specified packaging materials • Means of transport (e.g. by land, by sea or by air) ◆ Put extra labels on suitable position of the package of goods, such as: <ul style="list-style-type: none"> • Food ingredients label • Food nutrition label • Expiry date label • Warning label (e.g. flammable / fragile / poison) • Instruction signs for placing goods (e.g. showing up or down direction) • Goods installation instructions ◆ Operate packaging tools and machinery ◆ Use carton label to clearly list the information of the packaged goods ◆ Place / stack the packaged goods for subsequent transport and sale according to specified requirements <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Follow the occupational safety and health regulations and guidelines for package goods, ensuring no tolerance for any form of cheating and malpractice
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Distinguish different goods in the distribution centres or warehouses according to the established procedures of the organisation; and ◆ Package goods with different natures properly according to instructions and guidelines of the occupational safety and health regulations.
8. Remark	This UoC is adopted from 104958L1.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Implement goods delivery
2. Code	111300L2
3. Range	This unit of competency (UoC) is applicable to staff responsible for logistics in retail warehouses. Practitioners have the ability to complete the delivery procedures for goods according to the organisation's procedures and guidelines.
4. Level	2
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of goods delivery</p> <ul style="list-style-type: none"> ◆ Possess specific knowledge in goods received or delivered, including: <ul style="list-style-type: none"> • Handling procedures for goods • Names of and materials for packaging generally used • Understand marks and labels • Name of origin /destination, country and code • Distinguish general goods, special goods and dangerous goods • Expiry date • Barcode readability ◆ Understand the documents and records for delivery ◆ Understand the basic procedures and charges for delivery <p>6.2 Implement goods delivery</p> <ul style="list-style-type: none"> ◆ Schedule the flow of receiving goods to meet the warehouse operation requirements and to reduce suppliers' waiting time ◆ Verify shipping order records ◆ Observe visually to see if the goods are up to standard in appearance ◆ Verify the identity of consignor / consignee ◆ Collect freight charges, storage charges and other related fees (if applicable) to be paid by the customer ◆ Follow the procedures to check and receive the goods and documents, verify the marks and labels, and sign to acknowledge the receipt of goods ◆ Communicate with the higher level and related parties for any special situations ◆ Verify the information, quantity, document and carriage of goods with the other side to ensure they tally with the information on the document <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Follow the organisation's procedures and guidelines to arrange the delivery of goods, ensuring no tolerance for any form of cheating and malpractice
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Follow the organisation's procedures and guidelines to implement the delivery of goods; and ◆ Check if the information on the document tallies with the goods.
8. Remark	This UoC is adopted from 104960L2.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Receive returned goods in distribution centres
2. Code	111301L2
3. Range	This unit of competency (UoC) is applicable to staff handling goods in retail distribution centres or warehouses. Practitioners have the ability to handle returned goods in distribution centres or warehouses according to established guidelines and procedures, and ensure that the records of returned goods are correct.
4. Level	2
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of handling returned goods</p> <ul style="list-style-type: none"> ◆ Understand the policy and procedures of the organisation on returned goods ◆ Know how to handle the storage of problem goods according to the situation ◆ Understand the documents for returning goods ◆ Understand the inventory mechanism of the organisation ◆ Understand the infrastructure of distribution centre or warehouse ◆ Understand the occupational safety and health guidelines of the organisation <p>6.2 Receive returned goods in distribution centres</p> <ul style="list-style-type: none"> ◆ Assess goods to determine the reasons for returning them, such as: <ul style="list-style-type: none"> • Excess supply • Wrong delivery • Expired goods • Goods damaged (e.g. infested) during transportation ◆ Check the returned goods with the distribution record ◆ Return the non-damaged goods to the warehouse for storage ◆ Update the inventory record according to the organisation's procedures ◆ Save the documents for returning goods according to the organisation's procedures ◆ Record details of the problem goods, e.g. taking photos <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Follow related occupational safety and health regulations and guidelines to receive returned goods, ensuring no tolerance for any form of cheating and malpractice
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Follow the procedures of the organisation to complete the task of receiving returned goods, and return the non-damaged goods to the warehouse for storage; and ◆ Record information on returned goods correctly to reflect the real inventory situation.
8. Remark	This UoC is adopted from 104961L2.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Implement the import and export of goods
2. Code	111302L3
3. Range	This unit of competency (UoC) is applicable in the logistics and purchasing departments of the retail industry. Practitioners have the ability to master different procedures and requirements for the import and export goods (e.g. national laws, corporate procedures, customs procedures) in order to complete the import and export of goods and support the retail business of the organisation.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of import and export</p> <ul style="list-style-type: none"> ◆ Understand different modes of transaction, e.g. processing trade, import, export and re-export ◆ Understand the import/export documents, tariffs and customs clearance procedures ◆ Understand business law and relevant international conventions, regulations and legislation ◆ Understand the ordinances for the import and export of goods in Hong Kong ◆ Master import/export arrangement, e.g.: <ul style="list-style-type: none"> • Free on Board (FOB) • Cost and Freight (CFR) • Cost Insurance and Freight (CIF) • Bills of Lading • Master different types of payment ◆ Understand the classification of goods and documents required by the Customs Department ◆ Understand the clearance procedures, customs certificate and customs transfer arrangement ◆ Master the organisation’s criteria and procedures for the imports and exports <p>6.2 Implement the import and export of goods</p> <ul style="list-style-type: none"> ◆ Identify the category of goods being processed ◆ Confirm the international regulations and licences needed for the transport of goods ◆ Arrange documents needed for completion of transport ◆ Ensure that documents completed are submitted to the units concerned according to the organisation’s procedures ◆ Calculate the costs involved in the import and export of goods ◆ Master the customs licensing requirements and confirm the most appropriate transport service and transport insurance ◆ provide the documents and procedures required by the Customs Department and complete the required procedure ◆ Monitor the time required to transport, coordinate with different parties and ensure the goods are delivered to the destination on time ◆ Arrange claim adjusters to survey the goods when the imports/exports have serious shortages or quality problems <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Comply with the legal requirements on logistics transport, customs and bonded goods when implementing the import and export of goods
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Identify the category of goods and licences needed for customs import and export; ◆ Coordinate with different parties to ensure that the goods are delivered to the destination; and ◆ Correctly record the fees involved in the import and export of goods according to the organisation’s procedures.
8. Remark	This UoC is adopted from 104964L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Supervise the delivery of goods
2. Code	111303L3
3. Range	This unit of competency (UoC) is applicable to staff handling goods in retail distribution centres or warehouses. Practitioners have the ability to supervise the delivery of goods (from distribution centres to retail stores), and handle the goods returned for whatever reasons in the delivery process.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of the delivery of goods</p> <ul style="list-style-type: none"> ◆ Understand the retail supply chain procedures of the organisation ◆ Understand the importance of efficient delivery procedures ◆ Understand the organisation’s procedures for distributing and transporting goods ◆ Understand retail stores’ requirement on time of receiving goods ◆ Understand documents related to the delivery of goods, such as: <ul style="list-style-type: none"> • Application form • Delivery service application form • Delivery form • Return form • Form of receipt ◆ Understand the unloading environment (e.g. shopping mall and railway station) and requirements (e.g. no stopping zone restriction, vehicle length and noise) ◆ Understand the logistic support for the retail business of the organisation ◆ Understand the transportation requirements for different goods (e.g. temperature for freezing and restrictions on dangerous goods) ◆ Master the safety procedures for goods transport <p>6.2 Supervise the delivery of goods</p> <ul style="list-style-type: none"> ◆ Arrange appropriate mode of delivery, including vehicle category, outsourcing transportation, etc. ◆ Implement pre-delivery procedures according to the organisation’s guidelines, including: <ul style="list-style-type: none"> • Check the vehicle • Prepare documents before departure • Brief the driver • Special remarks on delivery ◆ Check the goods in the distribution centre to confirm that: <ul style="list-style-type: none"> • The delivery documents are correct • The conveyance suits the goods type • The quantity is correct • The goods are intact ◆ Arrange the route and time for delivery, including the alternative route in case of emergency ◆ Supervise and supervise the subordinates to perform tasks related to the delivery of goods ◆ Process delivery-related documents to ensure that they are complete and filed <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Supervise the subordinates to perform goods delivery tasks or returns for various reasons according to the occupational safety and health regulations and guidelines
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Supervise the delivery of goods, including supervising the subordinates to perform delivery tasks, according to the organisation’s guidelines; and ◆ Distribute the goods to retail stores accurately on time.
8. Remark	This UoC is adopted from 104965L3. The UoC title in Chinese is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Supervise the product distribution process
2. Code	111304L3
3. Range	This unit of competency (UoC) is applicable to logistics staff in the retail industry. Practitioners have the ability to master, organise and evaluate the organisation’s procedures and information of product wholesale, distribution, inventory and transport in order to use in the associated supervisory work.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of product distribution</p> <ul style="list-style-type: none"> ◆ Master the purpose of inventory management and product distribution, e.g. the relationship of costs and inventory portfolio / level to profit ◆ Understand the organisation’s inventory record system, e.g.: <ul style="list-style-type: none"> • Basic information of inventory • Inventory level control • Computer application • Inventory report ◆ Understand the transport flow and details of product distribution / delivery <ul style="list-style-type: none"> • Supply chain concept • Transport flow • Related computer system ◆ Understand the responsibilities of the organisation’s retail business under the supply and distribution agreement ◆ Understand client’s expectation on the organisation’s retail business concerning product supply and distribution <p>6.2 Supervise the product distribution process</p> <ul style="list-style-type: none"> ◆ Supervise / control the inventory quantity and product type, including: <ul style="list-style-type: none"> • Understand basic and accessory product types • Master and control the inventory level • Understand the relationship between product mix and the sales of product • Arrange replenishment and delivery ◆ Formulate the inventory plan and method, e.g.: <ul style="list-style-type: none"> • The best inventory portfolio • The best inventory level • The best product source • Fixed-location/random-location storage • Storage location (e.g. supplier, distribution warehouse) ◆ Maintain communication with clients and make arrangements for product distribution and delivery ◆ Supervise the distribution and delivery of products, including: <ul style="list-style-type: none"> • Master the transport flow and system • Master the transport management, such as the coordination of storage location, delivery method and time • Packaging and delivery of the products • Monitor and guarantee the quality of the products during distribution and delivery • Insurance arrangement for the products • Handle customer complaints / feedback on product distribution <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Protect the benefit of the organisation when managing the product distribution process, and ensure that the whole process complies with the regulatory and legal requirements and no tolerance for any form of cheating and malpractice

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Master the organisation's procedures and information of product wholesale, distribution, inventory and transport; and ◆ Master the knowledge of retail product wholesale and transport management, and use it in the associated supervisory work.
8. Remark	This UoC is adopted from 104966L3. The UoC title in Chinese is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Implement logistic safety and health management measures
2. Code	111305L3
3. Range	This unit of competency (UoC) is applicable in relevant workplaces of the retail industry. Practitioners have the ability to implement logistic safety and health management measures in daily routines according to the organisational and regulatory requirements.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of occupational safety and health</p> <ul style="list-style-type: none"> ◆ Possess basic knowledge of occupational safety and health and know its application ◆ Understand the safety responsibilities, including legal responsibilities, of employees of all levels in the logistic department ◆ Understand the occupational safety and health management system of the organisation ◆ Understand the occupational safety and health duties that need to be carried out in logistics related processes and workplaces ◆ Understand potential occupational safety risks in logistic workplaces <p>6.2 Implement logistic safety and health management measures</p> <ul style="list-style-type: none"> ◆ Analyse potential hazards for different jobs and procedures according to procedures and guidelines set out in the occupational safety and health management system; formulate suitable safety measures from the aspects of “Man, Machine, Material, Method and Environment”; implement these measures to provide a safe working environment, including: <ul style="list-style-type: none"> • Safety inspection • Personal protection • Preventive measures • Monitoring the contractors • Providing sufficient resources, information and training • Setting up in-house safety committee according to the legal requirements if necessary ◆ Implement the occupational safety and health management system of the organisation, including: <ul style="list-style-type: none"> • Carrying out the targets of the management system • Setting up management committee to conduct regular reviews • Implementing management system mechanism • Implementing monitoring mechanism, e.g. making the fire escape route map • Establishing response system • Providing training in occupational safety and health management system for new employees • Supporting the work of the safety committee and working groups • Implementing emergency drills (for fire escape, emergency evacuation, electrical short-circuit, infectious disease, rodent infestation, etc.) ◆ Apply basic knowledge of occupational safety and health to perform occupational safety and health management duties so as to reduce accidents, including: <ul style="list-style-type: none"> • Inspecting workplace safety • Checking the preventive measures • Assessing the safety of conveyance / equipment of all kinds • Assessing basic risks • Following up investigations on accidents • Assisting in launching safety promotion events • Conducting work hazard analysis • Formulating pest and rat control • Organising relevant group meetings <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the logistic safety and health management measures meet the organisational legal requirements

7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Implement safety and health management measures effectively according to the requirements of the organisation in order to minimise accident and provide a safe working environment.
8. Remark	This UoC is adopted from 104967L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Monitor the inventory level to meet the demand
2. Code	111306L3
3. Range	This unit of competency (UoC) is applicable to departments related to inventory management in the retail industry. Practitioners have the ability to accurately monitor the inventory level according to the inventory control procedures of the organisation to ensure that stocks are adequate to meet the business demand.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of inventory management</p> <ul style="list-style-type: none"> ◆ Know the importance of inventory control ◆ Understand the principle of inventory management, such as the purpose of inventory management, inventory control, inventory control, etc. ◆ Understand the inventory policy and procedures of the organisation ◆ Understand the inventory control systems of the organisation ◆ Understand the minimum delivery quantity and order time required ◆ Understand different inventory control technologies, e.g.: <ul style="list-style-type: none"> • Electronic scanning • Bar code • Electronic article surveillance (EAS) tag • Radio-frequency identification (RFID) <p>6.2 Monitor the inventory level to meet the demand</p> <ul style="list-style-type: none"> ◆ Monitor the flow of goods in the warehouse through the records of incoming and outgoing documents, e.g. receipts, despatch notes, bills, etc. ◆ Record the inventory, including: <ul style="list-style-type: none"> • Monitoring the inventory level • Inputting the quantities of goods accepted and delivered to the inventory system • Recording all the discrepancies • Submitting reports to related units and remind them of the inventory status • Monitoring the inventory situation and report on the fast-selling, unsaleable and out-of-stock items • Monitoring the warehouse space situation to coordinate the storage plan ◆ Coordinate with the purchasing department for inventory replenishment in order to meet the demand ◆ Assist in stock taking in order to update the inventory system data <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the inventory data provided is accurate and no cheating and malpractice is tolerated
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Monitor and record the inventory effectively; and ◆ Coordinate and communicate with all related units to ensure adequate supply of stock.
8. Remark	This UoC is adopted from 104968L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Implement inventory procedures
2. Code	111307L3
3. Range	This unit of competency (UoC) is applicable to staff of the inventory control and management department in the retail industry. Practitioners have the ability to implement the established inventory procedures of the organisation to ensure that the related operating procedures have been followed through.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of inventory management</p> <ul style="list-style-type: none"> ◆ Understand the general standard of inventory management ◆ Understand the legal regulations on inventory procedures ◆ Understand the special requirements of the organisation for inventory procedures ◆ Understand the inventory procedures of the organisation, e.g. <ul style="list-style-type: none"> • Inventory documents • Stock-taking, etc. ◆ Understand the actual operation of the inventory system of the organisation <p>6.2 Implement inventory procedures</p> <ul style="list-style-type: none"> ◆ Implement inventory procedures independently in various predictable and regular circumstances in accordance with the inventory handling procedures of the organisation <ul style="list-style-type: none"> • Dispatch goods according to the rules stipulated by the organisation e.g. by using the first-in-first-out principle (FIFO) • Record and handle damaged goods in accordance with the rules stipulated by the organisation • Implement regular and cyclic stock-taking <ul style="list-style-type: none"> ○ Arrange staff without direct participation in warehouse management to take stock regularly while supervisors implement sudden inspections ○ Always keep record of stock-taking results and cross-check with warehouse's inventory records and accounting department's records ○ In case of discrepancies, immediately investigate and keep record, and report to the management ○ Input stock-taking results to inventory system ○ Understand the special arrangement and treatment for goods received and goods sent out by order during stock-taking • Adopt the established inventory procedures and documents of the organisation to ensure that the stock matches the inventory record <ul style="list-style-type: none"> ○ Check records of goods returned and exchanged ○ Check records of goods sent back to warehouse ○ Take stock of goods and keep record as soon as possible (before the deadline) after receiving and delivering goods ○ Attach the approved deliver order to every inventory record as a supporting document when dispatching goods ○ File vouchers in serial codes (or other designated format) to facilitate checking ◆ Implement inspection of the date of use of the inventory to ensure the accuracy of the corresponding data recorded in the inventory system <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the stock matches the inventory record, and do not allow any illegitimate treatment or amendment to the inventory record ◆ Define clearly the personnel being authorised to make amendments to the inventory record and their limits of authority, ensuring no tolerance for any form of cheating and malpractice

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Implement the established inventory procedures of the organisation effectively; and ◆ Input stock-taking results into inventory system and ensure the accuracy of inventory record.
8. Remark	This UoC is adopted from 104969L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Arrange maintenance and repair for transportation means
2. Code	111308L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for logistics transportation. Practitioners have the ability to arrange maintenance and repair for transportation means to ensure that they fulfil the safety requirements.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of maintenance and repair for transportation means</p> <ul style="list-style-type: none"> ◆ Master the organisation’s policy on maintenance and repair of transportation means ◆ Understand the purpose and importance of regular maintenance and repair of transportation means ◆ Know about maintenance and repair of transportation means and guidelines of manufacturers ◆ Know about the basic maintenance and repair methods for different transportation means (e.g. tyres, braking system) ◆ Understand established maintenance and repair procedures, methods and related contingency measures ◆ Know about the organisation’s safety inspection stipulations, frequency and methods (e.g. at a specific time period, by mileage) ◆ Understand the organisation’s maintenance and repair regulations and procedures for outsourced transportation means <p>6.2 Arrange maintenance and repair for transportation means</p> <ul style="list-style-type: none"> ◆ Arrange related maintenance and repair procedures and schedule according to the established policies of the organisation and the guidelines of the manufacturer ◆ Carry out inspection regularly according to the established procedures to ensure the normal operation of transportation means (e.g. vehicles and facilities) ◆ Record accurately related maintenance reports according to the established specifications and file them including maintenance and repair suggestions, fees, etc. ◆ Analyse and assess inspection reports <ul style="list-style-type: none"> • Confirm items that require maintenance and repair by referring to manufacturers’ specification requirements • Prioritise maintenance and repair items • Assess the effect on transportation and logistics service quality ◆ Arrange maintenance and repair work <ul style="list-style-type: none"> • Select appropriate maintenance contractors and eligible persons, and request for quotations • Submit a maintenance suggestion report and quotations to the higher level for vetting and approval • Discuss and arrange maintenance schedule with the manufacturer • Inspect results and quality after maintenance • Arrange maintenance as soon as possible in accordance with the organisation’s emergency contingency measures when unexpected incidents occur <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure transportation means are in good condition and goods are not damaged and punctually delivered to designated locations.
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Regularly inspect and analyse the maintenance and repair needs of the organisation’s transportation means; ◆ Select appropriate maintenance contractors and eligible persons in accordance with the organisation’s policies and guidelines, confirm and arrange maintenance and repair schedule with related persons; and ◆ Record maintenance and repair results accurately and file them.
8. Remark	This UoC is adopted from 104973L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Perform retail inventory management
2. Code	111309L3
3. Range	This unit of competency (UoC) is applicable to inventory management staff in the retail industry. Practitioners have the ability to employ the knowledge of retail inventory management to report and assess inventory information, so as to perform retail inventory management in familiar working environment (e.g. retail stores).
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of retail inventory management</p> <ul style="list-style-type: none"> ◆ Understand inventory management, such as: <ul style="list-style-type: none"> • Location and planning of inventory • Inventory system and control • Outdated and abandoned inventory ◆ Understand stock-taking method and procedures ◆ Know about the costs of inventory, such as: <ul style="list-style-type: none"> • Material cost • Out-of-stock cost • Cost of returned goods ◆ Understand the relationship between inventory and sales of goods, such as: <ul style="list-style-type: none"> • The best-selling goods • High gross profit goods • Seasonal goods • Popular goods • Form of display ◆ Know the inventory as well as dates of order and delivery for different direct suppliers ◆ Understand the operation of retail stores ◆ Understand procedures of returning goods <p>6.2 Perform retail inventory management</p> <ul style="list-style-type: none"> ◆ Perform goods yard management, e.g.: <ul style="list-style-type: none"> • Design a layout map showing the inventory racks in the warehouse, indicate the classification of goods in each area and post the layout map on the door of the warehouse • Put the goods by areas and by classification in a neat and tidy order • Manage the inventory racks in the warehouse according to serial number • Set a safe inventory level for the inventory goods • Apply the first-come-first-out (or some other) principle to govern the in and out of goods ◆ Perform stock-taking duty according to the established procedures, including: <ul style="list-style-type: none"> • Counting the quantity and value of the inventory on a regular basis • Recording the real balance of inventory • Recording the quantity of inventory loss ◆ Implement inventory policy, including: <ul style="list-style-type: none"> • Assessing the impact of marketing activities and market conditions on demand • Assessing customer demand and flow • Making forecast on sales volume • Determining the proportion between inventory and sales • Arranging replenishment of goods • Estimating ordering cost and inventory cost • Setting stock re-ordering level <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Comply with the inventory policy of the organisation when performing retail inventory management, ensuring no tolerance for any form of cheating and malpractice

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Employ the knowledge of retail inventory management to report and assess inventory information; and ◆ Perform the duties of retail inventory management, such as goods yard management and stock-taking.
8. Remark	This UoC is adopted from 104974L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Implement e-commerce logistics operating procedures
2. Code	111310L4
3. Range	This unit of competency (UoC) is applicable to staff of the logistics-related departments in the retail industry. Practitioners have the ability to implement different e-commerce logistics operations effectively.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of e-commerce logistics operation</p> <ul style="list-style-type: none"> ◆ Understand different types of e-commerce, such as: <ul style="list-style-type: none"> • E-commerce between company and consumer • E-commerce among companies ◆ Understand the e-commerce relationship between the organisation and relevant units and the information technologies being used ◆ Understand the limitations of e-commerce platform and the required data specifications ◆ Know the retail e-commerce operating procedures of the organisation, such as: <ul style="list-style-type: none"> • Customer data processing • Search management • Content and product / service catalogue management • Payment management • special incident / message notification ◆ Understand the liabilities and risks of performing e-commerce operations between the organisation and different units <p>6.2 Implement e-commerce logistics operating procedures</p> <ul style="list-style-type: none"> ◆ Use suitable technologies to perform e-commerce operations according to the e-commerce relationship between the organisation and different units ◆ Ensure the responsible staff are of the rank and level to perform the e-commerce operations ◆ Perform electronic document/data interchange according to the instructions on e-commerce operations ◆ Keep records of e-commerce operations ◆ Report to the higher level when a problem occurs, and make remedies <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Avoid breaching the Personal Data (Privacy) Ordinance when implementing e-commerce logistics operating procedures ◆ Prevent abuse of the e-commerce platform to carry out false / illegal acts
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Use information technologies correctly to carry out different forms of e-commerce operation with individual units.
8. Remark	This UoC is adopted from 104975L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Implement logistics management business continuity plans
2. Code	111311L4
3. Range	This unit of competency (UoC) is applicable to logistics management staff in retail stores. Practitioners have the ability to follow the corporate operational procedures, business continuity plans and emergency response measures in order to reduce the organisation's, customer's and business partner's loss, and resume normal business operation.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of logistics management business continuity plans</p> <ul style="list-style-type: none"> ◆ Understand the methods and processes of operating freight service and emergencies that may occur ◆ Understand the requirements and modes of operation of different business partners and relevant government departments ◆ Understand the impact of emergencies on logistics, e.g. typhoon, flooding, fire, power outage, mechanical and computer failure, explosion, strike, embargo, earthquake and epidemic ◆ Understand the activation mechanism for response procedures and business continuity plans in case of logistics emergencies ◆ Understand the operational system, report arrangements, limits of authority and accountability structure, ways of communication, etc. <p>6.2 Implement logistics management business continuity plans</p> <ul style="list-style-type: none"> ◆ Receive accurate message on unexpected logistics incidents, and activate the response procedures of the business continuity plans ◆ Deploy manpower and resources according to the response procedures and business continuity plans ◆ Carry out different levels of action according to established procedures, e.g. precautions, stopping operation, evacuation, etc. ◆ Liaise with or report to parties being affected, goods owners and business partners according to the response procedures ◆ Take relevant record and deliver the documents accordingly ◆ Report punctually to the higher level and stakeholders <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Protect the overall interests of the organisation, customers and business partners when implementing the logistics management business continuity plans ◆ Implement the procedures of the business continuity plans according to the ordinances, and the requirements and standards of the regulatory bodies and on occupational safety and health
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Activate response procedures and implement business continuity plans according to different emergency situations so that the organisation can resume normal business operation as soon as possible.
8. Remark	This UoC is adopted from 104976L4. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Manage inventory
2. Code	111312L4
3. Range	This unit of competency (UoC) is applicable to inventory management staff in the retail industry. Practitioners have the ability to manage inventory, so as to support the overall supply chain operation of the organisation.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand knowledge of inventory management</p> <ul style="list-style-type: none"> ◆ Understand the importance of inventory management to retail and trading businesses ◆ Understand the relationship between optimal inventory level and retail operation ◆ Understand the effect of inventory discrepancy on the organisation, including the impact / damage on its competitiveness / financial situation <p>6.2 Manage inventory</p> <ul style="list-style-type: none"> ◆ Apply inventory management techniques to determine the appropriate inventory level ◆ Provide customers with uninterrupted supply of goods and reduce overall inventory storage costs ◆ Coordinate and communicate with other departments on the production, delivery and sales of goods to ensure effective inventory management ◆ Introduce automation equipment for inventory management ◆ Liaise closely with the marketing and sales departments and the suppliers in order to assess the effect of promotions and market situation on inventory demand ◆ Assess organisation’s inventory level and forecast the inventory demand in order to perform inventory management ◆ Review the inventory management measures effectively, and take timely action to remedy unexpected happenings ◆ Optimise inventory management method to improve operation <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Follow the inventory management policies and procedures of the organisation ◆ Prevent any abuse of power or malpractice, such as abuse / misappropriation of the organisational assets and theft ◆ Ensure that all inventory management activities are legal
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Manage inventory to facilitate a smooth operation of the organisation’s supply chain; and ◆ Monitor the inventory level and estimate market demand in order to make the inventory management more cost-effective.
8. Remark	This UoC is adopted from 104977L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Provide logistic support
2. Code	111313L4
3. Range	This unit of competency (UoC) is applicable to logistic support staff in the retail industry. Practitioners have the ability to confirm the supports required for the retail units and arrange appropriate resources to ensure that the goods are delivered to these units.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of logistic support</p> <ul style="list-style-type: none"> ◆ Master the logistic support process and procedures of the organisation ◆ Understand the service pledge of the logistics department ◆ Understand the importance of efficient logistics management to the retail business ◆ Understand different logistics regulations or standards, e.g.: <ul style="list-style-type: none"> • International Organisation for Standardisation (ISO) • Road and rail regulations • International Maritime Dangerous Goods (IMDG) Code • Occupational health and safety • Customs ordinances • Import and export licences • Taxes and tariffs ◆ Understand the organisation’s logistics facilities for the retail business <p>6.2 Provide logistic support</p> <ul style="list-style-type: none"> ◆ Coordinate with the retail units to confirm their needs for logistic support ◆ Analyse the logistic support modes and skills suitable for respective retail units ◆ Work out the support plan, as well as the services and resources provided, with the retail units, including: <ul style="list-style-type: none"> • Transport vehicles • Manpower • Delivery schedule • Delivery document • Other related measures ◆ Implement and monitor logistic support activities to optimise the supply plan, mitigate excessive hoarding at retail locations, and prevent product supply shortages ◆ Review the effectiveness of logistic support with the retail units regularly, and adjust the support plan for greater effectiveness when necessary <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Comply with ordinances related to freight logistics when providing logistic support services ◆ Prevent any malpractice
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Confirm logistic needs of the retail units in order to provide support; and ◆ Implement, monitor and review the logistic support plan to achieve the best goods supply solution, and avoid overstocking or understocking in retail locations.
8. Remark	This UoC is adopted from 104981L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Manage imported and exported goods for cross-border e-business
2. Code	111314L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for managing cross-border inventories in the retail industry. Practitioners have the ability to manage inventory (including bonded warehouses) and complete relevant application document so as to support the overall smooth operation of the supply chain.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of cross-border e-business</p> <ul style="list-style-type: none"> ◆ Understand the importance of managing imported and exported goods in cross -border e-business operation ◆ According to the legal requirements, prepare proper documentation and timely inventory management for imported and exported goods. ◆ Understand the workflow of cross-border e-business operation <p>6.2 Manage imported and exported goods for cross-border e-business</p> <ul style="list-style-type: none"> ◆ Manage cross-border inventory of goods and send relevant information to the relevant law enforcement agencies (e.g. warehouses, customs commodity code, item tax and logistics data) ◆ Follow the instructions to ensure that warehousing and logistics data are transferred to other systems for integration <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Follow the corporate policies and procedures for inventory management ◆ Prevent any unlawful and smuggling ◆ Ensure that all inventory management activities are in compliance with the requirements of all stakeholders.
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Manage cross-border inventories so that cross-border goods supply chains can operate smoothly; ◆ Prepare the necessary and accurate document to related law enforcement agencies.
8. Remark	This UoC is adopted from 107149L4

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Formulate inventory control systems
2. Code	111315L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for inventory management in the retail industry. Practitioners have the ability to formulate inventory control systems to reflect the real inventory situation; and optimise inventory management for an effective retail business management.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Analyse the knowledge of inventory control</p> <ul style="list-style-type: none"> ◆ Master inventory control management (e.g. inventory plan, safe inventory, loss control, obsolete and waste stock) ◆ Master the functions and characteristics of different inventory management systems ◆ Understand the principle of inventory management ◆ Understand just-in-time inventory management, including: <ul style="list-style-type: none"> • Zero inventory philosophy • The environment of just-in-time inventory management • The advantage of just-in-time inventory management ◆ Understand costs of stocks (e.g. material costs, ordering costs, custody costs, out of stock costs) ◆ Master the skills in analysing inventories (bestselling items, high-margin items, seasonal items, popular items) ◆ Analyse the effects of different promotions on demands ◆ Analyse the effects of warehouse inventory zoning method on warehouse operations and procedures for receiving goods by retail stores <p>6.2 Formulate inventory control systems</p> <ul style="list-style-type: none"> ◆ Work with different departments in analysing the inventory system and structure of the organisation ◆ Analyse the inventory control system of the organisation ◆ Work out the inventory supply and workflow (e.g. time arrangement for buying, storing and delivering stocks) ◆ Formulate inventory control optimisation systems for: <ul style="list-style-type: none"> • Purchase control • Optimised warehouses • Withdrawing procedures • Manpower and responsibilities • Stock taking procedures • Automatic inventory monitoring systems (e.g. RFID, bar code) <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure the accuracy of the inventory control system used ◆ Prevent malpractice such as abuse / misappropriation of the organisational assets
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Master the knowledge of inventory management; and ◆ Analyse and consolidate information, formulate inventory systems for efficient inventory management and warehouse management to smoothen the retail business operation.
8. Remark	This UoC is adopted from 104984L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Optimise warehouse space utilisation and layout planning
2. Code	111316L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for warehouse space planning in the retail industry. Practitioners have the ability to take full consideration of the organisation’s requirements for warehouse space (e.g. seasonal factor, nature of products, etc.) and plan warehouse space and layout effectively, providing sufficient space for storage of goods and a safe working environment for staff.
4. Level	5
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Analyse the knowledge of warehouse storage space planning</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s business policies and operation strategies ◆ Understand the purpose and principle of warehouse management ◆ Analyse various methods and techniques for warehouse design ◆ Master factors of consideration for warehouse storage space measurement and layout design, e.g.: <ul style="list-style-type: none"> • The enterprise’s work specifications and quality • Inventory specifications of manufacturers and suppliers • Operating procedures and policies at workplace • Safety requirements for raw materials • Safety of working environment • Requirements of purchasing, commodity or other operating units ◆ Understand the legal norm, criteria, etc. related to warehouse design <p>6.2 Optimise warehouse space utilisation and layout planning</p> <ul style="list-style-type: none"> ◆ Cooperate with related business departments and collect information required for warehouse storage space planning, including: <ul style="list-style-type: none"> • Floor plan of warehouse, storage racking system, storage zone, usable space of floor height, etc. • Safety standards and legal requirements • Product type and special requirements (e.g. temperature, humidity, refrigeration) • Product size, volume • Number of days of storage • Operating time of warehouse and goods delivery, shifts of operation, number of staff • Special equipment and instruments (e.g. forklift) • Number / frequency and quantity of deliveries ◆ After analysing and assessing related data, design goods storage zone that fulfils the needs of the organisation <ul style="list-style-type: none"> • Individual space requirements for organising goods and storing goods • Space requirements for receiving goods, unloading, inspection operation and staging area • Space requirements for temporary storage of deliveries and loading • Space for the automation system of facilities • Space for staff facilities • Sufficient space for the operation of warehouse facilities • Balance the quantity of goods to be handled in different areas to avoid crowded or bottleneck condition • Place goods to be collected first near the loading and unloading area in order to save time • Utilise storage space effectively, and cater to the special requirements of regular and seasonal inventory • Warehouse storage space must fulfil related legal requirements, e.g. fire safety requirements

	<ul style="list-style-type: none"> ◆ Regularly review warehouse storage space utilisation, including: <ul style="list-style-type: none"> • Appropriateness of storage locations for fast and slow moving stocks • Sufficiency of the remaining space of the warehouse • Frequency of maintenance and cleaning ◆ Formulate a monitoring and report mechanism to ensure that the warehouse storage space planning meets the established objectives, and conduct regular reviews to provide improvement suggestions <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the warehouse storage space planning fulfils related legal requirements, and provides a safe working environment for staff
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Collect information required for warehouse storage space and layout planning, and plan and design warehouse storage space according to the organisation's operating strategies and regulations related to inventory; and ◆ Regularly review and analyse warehouse storage space planning and design and give improvement suggestions.
8. Remark	This UoC is adopted from 104985L5. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Manage logistics equipment
2. Code	111317L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for warehouse planning in the retail industry. Practitioners have the ability to select appropriate logistics equipment by factors like daily warehouse operation needs, commodity type, storage method, etc.
4. Level	5
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of warehouse equipment</p> <ul style="list-style-type: none"> ◆ Master the organisation’s established logistics procedures and processes ◆ Understand the organisation’s business operation strategies ◆ Understand the principle and purpose of warehouse management ◆ Understand the organisation’s policies on selection and replacement of facilities ◆ Master functions of various kinds of equipment and instruments for transporting warehouse materials, e.g.: <ul style="list-style-type: none"> • Stacker type forklift trucks • Forklift (manual or automatic) • Conveyor belt • Different types of storage racking equipment • Handcart, trolley • Pallets (plastic made, wooden, foldable roll containers, logistics containers) ◆ Master the environment of warehouse operation and types of items stored ◆ Understand occupational safety and health regulations, e.g.: <ul style="list-style-type: none"> • Safety regulations for storage • Weight limits of equipment • Safe operating procedures • Personal protective equipment, etc. • Qualifications requirements for operators and certificates required <p>6.2 Manage logistics equipment</p> <ul style="list-style-type: none"> ◆ Communicate and cooperate with business department, and master information of the daily warehouse operation, including: <ul style="list-style-type: none"> • Floor plan of warehouse • Means of transporting goods • Usage of handling equipment • Weather effects on equipment ◆ After analysing and assessing related data, select appropriate instruments and equipment in accordance with the organisation’s selection criteria <ul style="list-style-type: none"> • Technical requirements for equipment operation • Type of goods • Safe working environment • Mechanisation or automation • Cost effectiveness • Specifications of equipment, reparability • Cater to future operation needs, etc. ◆ Submit purchase selection reports to related departments for them to make purchases instruments and equipment in accordance with the organisation’s established purchasing procedures ◆ Request for information such as operation and maintenance manuals from manufacturers of equipment and instruments and formulate operation and maintenance guidelines and procedures in accordance with the requirements of the organisation and safety related legal requirements

	<ul style="list-style-type: none"> ◆ Let the related operating staff understand the organisation's established guidelines and code of practice for the operation and maintenance of equipment and instruments through effective communication channels ◆ Monitor and inspect the daily operation of equipment and instruments and their stability, and provide suggestions for maintenance and replacement when necessary <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the selected equipment and instruments fulfil related safety legal requirements
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Analyse daily warehouse operation needs and select instruments and equipment that cater to the organisation's business needs in accordance with the organisation's selection criteria; and ◆ Formulate safety operation guidelines and maintenance procedures for the operation of equipment and instruments, let the related operating staff have a clear understanding of the related code of practice and guidelines through effective communication channels, and monitor and inspect the daily operation of equipment and instruments.
8. Remark	This UoC is adopted from 104986L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Establish and maintain a supply chain
2. Code	111318L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for designing, establishing and maintaining a supply chain in the retail industry. Practitioners have the ability to establish and maintain an overall smooth supply chain for the organisation addressing to the floating demand for various types of goods of different departments / stores of the organisation.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand knowledge related to a supply chain</p> <ul style="list-style-type: none"> ◆ Understand the importance of a designed supply chain to the operation and overall profit of retail business ◆ Understand the principle of purchase and inventory ◆ Understand the organisation’s rules and guidelines related to inventory record, e.g.: <ul style="list-style-type: none"> • Specifications of goods • Maintenance information • Service contract • Inventory level • Date of purchase • Expected life • Minimum collection quantity ◆ Identify the routine of inventory and supply chain in order to increase business automation ◆ Master the detailed background and information of suppliers that provide goods required by the organisation <p>6.2 Establish and maintain a supply chain</p> <ul style="list-style-type: none"> ◆ Formulate guidelines for filing records for goods required by the organisation ◆ Formulate guidelines for updating maintenance (such as order level) and its supplementary documents for goods required by the organisation ◆ Implement supply chain management system to monitor the inventory amount of various types of goods in different stores and identify the need for re-purchase ◆ Monitor inventory amount and record storage location to identify the need for re-purchase ◆ Clearly master inventory and the quantity on delivery in order to forecast the demand for goods, confirm order amount and reduce inventory cycles ◆ Smoothen the daily operation of a supply chain by system automation ◆ Increase cost efficiency and inventory return by reducing excess inventory, warehouse charges and the cost of handling unnecessary orders ◆ Formulate a delivery plan in order to optimise the material delivery of various operating departments and stores ◆ Implement supply chain management system in order to manage the facilities and goods delivery at different locations ◆ Look for and select appropriate suppliers and handle orders safely, quickly and properly <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the benefits of all stakeholders have been taken into account in formulating supply chain guidelines for the organisation ◆ Prevent the supply chain of the organisation turning into a platform for abuse of power or malpractice
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Identify the need for purchase by making use of effective inventory monitoring method; and ◆ Formulate a delivery plan and deliver goods to various retail stores effectively.
8. Remark	This UoC is adopted from 104987L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Formulate inventory management strategies
2. Code	111319L5
3. Range	This unit of competency (UoC) is applicable to inventory management staff in the retail industry. Practitioners have the ability to understand the overall inventory needs and procedures of the organisation; and formulate effective inventory management strategies to ensure the accuracy of inventory and smooth supply of goods.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of inventory management</p> <ul style="list-style-type: none"> ◆ Master inventory control management, such as: <ul style="list-style-type: none"> • Inventory plan • Safe inventory • Loss control • Obsolete inventory ◆ Possess knowledge of inventory procedures ◆ Know the importance of setting up inventory management system and measures to prevent fabrications of inventory records for misappropriation of corporate assets ◆ Understand the legal and corporate regulations and requirements for inventory procedures <p>6.2 Formulate inventory management strategies</p> <ul style="list-style-type: none"> ◆ Formulate inventory management procedures for retail goods, including: <ul style="list-style-type: none"> • Inventory records • Receipt of goods • Goods delivery • Stock-taking • Dispose of goods • Retrieval of goods delivered • Returns and exchanges ◆ Formulate suitable warehousing district strategy for goods ◆ Formulate stocktaking procedures to categorise inventories (fast-moving, slow-moving, high value-added, etc.) ◆ Formulate the responsibilities of inventory management staff to carry out appropriate division of labour, checks and balances ◆ Formulate stocktaking and coordinate strategy differences ◆ Carry out monitoring and audit control to ensure that the staff comply with established procedures ◆ Formulate the functional authority of staff of different levels in approving different goods <ul style="list-style-type: none"> • Replenish items consumed • Acknowledge receipt of goods • Dispose of unusable, obsolete, or surplus goods • Staff conduct guidelines • Guidelines on other policies e.g. declaration of conflict of interest and acceptance of advantage ◆ Review and improve the inventory management system ◆ Note and assess the risks when formulating inventory management strategies <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the inventory information is correct ◆ Formulate management strategies to prevent any abuse of power or malpractice, such as abuse / misappropriation of the corporate assets and theft

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Formulate effective inventory strategies to ensure smooth supply of goods; ◆ Establish effective inventory management monitoring measures to prevent misappropriation of the organisational assets by staff; and ◆ Review and improve the inventory management system of the organisation.
8. Remark	This UoC is adopted from 104988L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Develop logistics management business continuity plans
2. Code	111320L5
3. Range	This unit of competency (UoC) is applicable to the logistics management staff in retail shops. It requires creativity and judgement. Practitioners have the ability to lead the team to formulate the logistics management business continuity plans and ensure that the goods can be delivered to the retail points on time.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of business continuity</p> <ul style="list-style-type: none"> ◆ Master the business development of the organisation ◆ Understand the importance of logistics management business continuity plans ◆ Master knowledge of risk management, such as: <ul style="list-style-type: none"> • Types of risk • Analysis of risk factors • Plans for controlling and solving risks ◆ Master the corporate business continuity and operation recovery plan <p>6.2 Develop logistics management business continuity plans</p> <ul style="list-style-type: none"> ◆ Formulate a logistics management business continuity plans ◆ Perform business impact analysis to: <ul style="list-style-type: none"> • Ensure that the retail points maintain operation • Ensure that the delivery of goods or services are not interrupted • Assess the potential loss ◆ Evaluate the possible causes of delivery interruption, e.g.: <ul style="list-style-type: none"> • Warehouse floods, fires, and other possible natural disasters • Communication interruptions • Epidemic disease • Road blockage ◆ Evaluate the internal resources for business continuity, such as manpower, communication, means of transport, etc. ◆ Confirm the external resources for the logistics management business continuity plans, e.g. supplier, government public services, etc. ◆ Establish continuity / recovery plan procedures to ensure business continuity, including the job duties and responsibilities of respective staff members ◆ Review the effectiveness of the logistics management business continuity plans, and make improvements when necessary <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Protect the overall interests of the organisation, clients and business partners
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Carry out an overall business analysis and develop a logistics management business continuity plan; ◆ Identify different types of interruption and formulate appropriate solutions; and ◆ Review and improve the business continuity plans.
8. Remark	This UoC is adopted from 104991L5. The UoC title in Chinese is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Improve the supply and distribution chain
2. Code	111321L6
3. Range	This unit of competency (UoC) is applicable to the supervisory and management staff in the retail industry. Practitioners have the ability to establish an appropriate supply and distribution chain for the organisation in the absence of complete or continuous data / information and continuously improve it according to the organisation’s business strategies in order to promote the development of the organisation’s retail business.
4. Level	6
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Integrate and understand the knowledge of the supply and distribution chain</p> <ul style="list-style-type: none"> ◆ Master the organisation’s operation strategies and goal, market status and competitiveness ◆ Understand the importance of a well-designed supply and distribution chain to the retail business operation and the overall profit of the organisation ◆ Have expert knowledge of the business partner relationship between the organisation and different suppliers ◆ Have expert knowledge of the good performance criteria for a supply and distribution chain ◆ Master factors affecting supply of goods, e.g. <ul style="list-style-type: none"> • Customers’ demand for goods • Cost price (raw materials, manpower, freight charges, etc.) • Government policies • Seasonal or fashion effect <p>6.2 Improve the supply and distribution chain</p> <ul style="list-style-type: none"> ◆ Obtain and organise detailed information of suppliers and their goods and process the data by computer database software when necessary ◆ Pay attention to and update information of suppliers and their goods, analyse the potential effect on the retail business of the organisation ◆ Understand whether or not the supplier’s source of goods (from raw materials to the supplier) will lead to sensitive problem such as the employment of illegal workers by manufacturers, etc. ◆ Review, compare and analyse reports on sales, customer satisfaction level, and quality of goods, etc, in order to analyse their effects on the supply and distribution chain ◆ Formulate precise standards for quality and quantity of goods supplied ◆ Formulate policies and procedures for supply and distribution of goods, including: <ul style="list-style-type: none"> • From raw material to the supplier • From supplier to the organisation • From warehouse to various stores / retail spots • From the organisation to the ultimate customer, etc. ◆ Critically conduct a comparative analysis of the supply and distribution chain in operation against the good performance criteria / performance of competitors and make amendments when the standard is not reached ◆ Accurately forecast and analyse future market supply and demand for goods in order to forecast the amount to be purchased from various suppliers in advance ◆ Regularly review and implement improvement plans with key suppliers and supply chain service providers ◆ Regularly submit report to the management including: <ul style="list-style-type: none"> • Performance of the supply and distribution chain in operation • Suggestions for adding / strengthening / discontinuing suppliers • Make adjustments based on future demand and give Suggestions to improve the supply and distribution chain • Strive for additional resources / manpower required • Changes in operating cost and optimisation method, etc. <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Protect the benefits of the organisation when improving the supply and distribution chain ◆ Prevent any abuse of power or malpractice, such as abuse / misappropriation of the

	organisational assets and theft when improving the supply and distribution chain
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Establish an appropriate supply and distribution chain according to the business strategies and goals of the organisation; and ◆ Continuously improve the supply and distribution chain to promote the long-term development of retail business of the organisation.
8. Remark	This UoC is adopted from 104992L6.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Formulate cross-border logistics solutions
2. Code	111322L6
3. Range	This unit of competency (UoC) is applicable to logistic management staff in the retail industry. Practitioners have the ability to formulate logistics solutions for cross-border business coverage areas (e.g. pearl river delta or other countries) in order to provide a logistics service which is more cost-effective and favourable to the business development of the organisation.
4. Level	6
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Integrate and understand the knowledge of regional / transnational logistics operation</p> <ul style="list-style-type: none"> ◆ Have expert knowledge of the operation strategies of the organisation for different regions / countries ◆ Integrate the requirements of these regions / countries on logistics, transportation, warehousing, customs and bonded operations ◆ Have expert knowledge of the principle of transportation network design in different regions / countries and the principle of integration in multimodal transport, cargo handling and warehousing ◆ Have expert knowledge of the calculation of costs using different modes of logistic transport in different regions/countries, e.g. road, railway, river and aviation network ◆ Have expert knowledge of the information on the strengths, scope of service, service points, warehouse locations, etc. of different regional / third party and fourth-party logistics service providers <p>6.2 Formulate cross-border logistics solutions</p> <ul style="list-style-type: none"> ◆ Critically analyse, re-organise and evaluate information on operation and supplies as well as sales data in order to formulate regional / transnational logistics solutions favourable to the business development of the organisation ◆ Bring about synergy through coordination and integration of the resources in the organisation network and of cooperation from partners, and design cost-effective transport modes, delivery network / routings, multimodal arrangements, means of transport, etc. ◆ Compile reports to illustrate the design concept, principle and mode of operation of the logistics solutions ◆ Plan the procedures for handling and transferring goods, documents and information ◆ Establish key performance indicators (KPI) to make the logistics solutions measurable, and review the implementation of the solutions <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure the regional / transnational logistics solutions formulated comply with the legal requirements on logistic transport, warehousing, customs and bonded operations
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Formulate cost-effective and feasible regional / transnational logistics solutions according to the operation policy and business development of the organisation to improve business performance; ◆ Ensure the implementation of regional / transnational logistics solutions formulated complies with the KPI; and ◆ Compile reports to illustrate to the management the content and operation of the logistics solutions.
8. Remark	This UoC is adopted from 104995L6.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Handle logistics crises
2. Code	111323L6
3. Range	This unit of competency (UoC) is applicable in logistic management departments of the retail industry. Practitioners have the ability to handle logistics crises effectively in order to protect the benefit of the organisation with respect to its long-term development and business management.
4. Level	6
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of logistics crisis</p> <ul style="list-style-type: none"> ◆ Understand the characteristics of freight and logistic activities related to the retail industry ◆ Understand the type and nature of a crisis to see whether it is an unexpected, imminent, intimidated, open, long-term or short-term crisis ◆ Understand the effect of a logistics crisis on the operation of the retail industry ◆ Understand the effect of an ongoing logistics crisis on the image and profits of the organisation ◆ Understand the basic principles of handling logistics crisis ◆ Understand the social responsibilities of the organisation and its objectives and values when handling crisis <p>6.2 Handle logistics crises</p> <ul style="list-style-type: none"> ◆ Establish awareness and culture of logistics crisis management with respect to the management policies and objectives of the organisation ◆ Establish systematic communication mechanism for staff of different positions to understand how the company handles logistics crises ◆ Establish a crisis management team and identify responsibilities of each member when a crisis comes ◆ Investigate and assess potential logistics crises ◆ Establish contingency plans for projects that are risky or may have serious consequences in order to minimise the impact on the enterprise ◆ Evaluate the chance for a crisis to occur and its influence ◆ Once there is a logistics crisis, start the established crisis management plan and deploy relevant staff members as quickly as possible ◆ Review and submit reports after the logistics crisis to suggest improvements <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Follow relevant logistics regulations to handle logistics crises ◆ Protect the overall interests of the organisation, the clients and the business partners
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Handle logistic or freight crises; and ◆ Review and submit reports after the logistics crisis to suggest improvements.
8. Remark	This UoC is adopted from 104996L6.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Formulate risk management plans
2. Code	111324L6
3. Range	This unit of competency (UoC) is applicable to logistic / warehousing department in the retail industry. Practitioners have the ability to apply the risk management knowledge and techniques and, based on the thorough understanding of the transport procedure, to formulate risk management plans for different working procedures.
4. Level	6
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Integrate and understand the knowledge of risk management</p> <ul style="list-style-type: none"> ◆ Have expert knowledge of the definitions of risk management, including: <ul style="list-style-type: none"> • Importance of risk management • Risk management theory: <ul style="list-style-type: none"> ○ Avoid risks ○ Prevent loss ○ Minimise loss ○ Transfer risks ○ Retain risks ◆ Integrate contemporary risk management modes, including: <ul style="list-style-type: none"> • Current development of risk management • Ways of handling crisis • Post-crisis risk management strategies ◆ Have expert knowledge of the assessment of risks, including: <ul style="list-style-type: none"> • Importance of the degree of loss • Risk measurement ◆ Have expert knowledge of the ways of controlling risks, including: <ul style="list-style-type: none"> • Importance of risk control • Pre-assessment of risks • Pre-incident risk control and post-incident financial compensation; Master the business strategy of the organisation <p>6.2 Formulate risk management plans</p> <ul style="list-style-type: none"> ◆ Master various working procedures and characteristics of logistics operations, and apply risk management knowledge and techniques to formulate risk management plans, including setting up risk management committee, formulating risk monitoring plans, analysing risk management tools and reviewing the mechanism ◆ Analyse the cost of accident and benefits of safe operation ◆ Consider the advantages and disadvantages of different risk control plans ◆ Discuss with other departments on daily operational needs so as to formulate suitable and effective risk management plans ◆ Discuss with insurance intermediaries on daily operational needs so as to formulate suitable and effective risk transfer plans <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Consider thoroughly factors like occupational safety, health and environmental protection when formulating risk management plans; ensure that the purchasing strategy supports the overall business of the organisation by implementing economical procurement, centralisation, quality management, etc.
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Apply the knowledge of risk management to analyse rationally the logistics operations of the retail industry, and to assess the influence of risks on operation of the company; and ◆ Formulate effective risk management plans.
8. Remark	This UoC is adopted from 104997L6.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Manage third party logistics services
2. Code	111325L6
3. Range	This unit of competency (UoC) is applicable to policy makers in the retail industry. Practitioners have the ability to identify the work flow of the outsourced logistics services and monitor the performance of contractors/service providers in order to improve the organisation’s business efficiency.
4. Level	6
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Integrate and understand the knowledge of third party logistics services management</p> <ul style="list-style-type: none"> ◆ Have expert knowledge of the business strategy and management policies of the organisation ◆ Integrate the supply chain structure and function of the organisation ◆ Integrate the advantages, disadvantages, risks, etc. of employing third party logistics services, such as: <ul style="list-style-type: none"> • Making full use of the resources and business flexibility • Minimising costs • Leaking company information ◆ Have expert knowledge of various skills of market analysis and research, e.g.: <ul style="list-style-type: none"> • Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis • Service Quality Model (SERVQUAL) ◆ Have expert knowledge of the skills in monitoring contractor management <p>6.2 Manage third party logistics services</p> <ul style="list-style-type: none"> ◆ Identify services in the supply chain work flow that can be outsourced so as to use the organisation’s resources more effectively <ul style="list-style-type: none"> • Advantages, disadvantages and risks of outsourcing services • Ordinances related to the regulation of outsourced services ◆ Set criteria and procedures for employing third party logistics services <ul style="list-style-type: none"> • Procedures and standards for screening service providers • Negotiate and enter a contract • Tendering procedures • Scope of service • Service performance requirements and standards • Monitoring procedures • Reporting procedures ◆ Select and appoint service provider <ul style="list-style-type: none"> • Implement tendering procedures according to the organisation’s guidelines • Appraise service providers according to established standards • Select an appropriate outsourced logistics service provider • Sign a contract with the outsourced logistics service provider ◆ Establish a communication mechanism to maintain close communication with the outsourced logistics service providers to ensure a smooth operation of the outsourced services ◆ Monitor and regularly appraise the performance of the outsourced logistics service providers according to the service standards stated in the contract <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Prevent any abuse of power or malpractice when managing third party logistics services

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Identify services in the supply chain work flow that can be outsourced; ◆ Formulate contractor screening criteria and procedures to identify outsourced service providers that meet the requirements of the organisation, and enter a contract with terms in both sides' interests; and ◆ Monitor and appraise the performance of the outsourced service providers regularly to ensure they provide quality services according to the contract terms.
8. Remark	This UoC is adopted from 104998L6.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Supply Chain Management’

1. Title	Formulate cross-border warehousing and logistics strategy
2. Code	111326L6
3. Range	This unit of competency (UoC) is applicable to staff responsible for strategy development in the retail industry. Practitioners have the ability to formulate cross-border warehousing and logistics strategy to maintain efficient and low-cost logistics solutions for the most benefit of the corporate.
4. Level	6
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Comprehensively analyse the knowledge of cross-border warehousing and logistics strategy</p> <ul style="list-style-type: none"> ◆ Analyse the characteristics and related policies / regulations of cross-border warehousing and logistics <ul style="list-style-type: none"> • Time • Tax or quarantine ◆ Analyse the characteristics of products, such as: <ul style="list-style-type: none"> • Time or seasonal merchandise • Products that require quarantine or taxation • Bulky merchandise • Easily fragile or damaged • Security (including battery pack) ◆ Analyse comprehensively the options provided by warehousing and logistics partners and take into account the impact of short- and long-term costs and their quality of service <p>6.2 Formulate cross-border warehousing and logistics strategy</p> <ul style="list-style-type: none"> ◆ Formulate effective cross-border warehousing and logistics strategy in accordance to the objectives of the corporate <ul style="list-style-type: none"> • Identify suitable storage areas <ul style="list-style-type: none"> ○ Close to the target customer group ○ Adequate logistics infrastructure ○ Tariff benefits ○ Security and insurance costs • Review the cross-border warehousing and logistics strategy and evaluate its operational effectiveness to the corporate on a regular basis <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Comply with relevant legal policies and requirements when considering and formulating the cross-border warehousing and logistics strategy ◆ Protect the interests of customers, business partners and corporate
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Master the professional knowledge of cross-border warehousing and logistic process; and ◆ Formulate effective cross-border warehousing and logistics strategy to meet the objectives of the corporate. Review and consolidate relevant information to assess, identify and evaluate the operation so as to support the long-term development of the corporate.
8. Remark	This UoC is adopted from 107151L6A

Units of Competency for 'Customer Services'

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Services’

1. Title	Provide support and advice to customers
2. Code	111327L1
3. Range	This unit of competency (UoC) is applicable to staff responsible for customer service or sales-related work in the retail industry. Practitioners have the ability to provide general support to customers. Complex technical support / enquiries will be referred to suitable technical personnel or departments to follow up.
4. Level	1
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of general customer support</p> <ul style="list-style-type: none"> ◆ Understand the importance of customer relationship and customer service ◆ Master the customer service procedures of the organisation ◆ Master interpersonal skills, including: <ul style="list-style-type: none"> • Letting the customers feel warm and courteous • Being sincere and willing to help • Letting the customers feel comfortable and reliable • Being objective and impartial ◆ Master the basic skills of customer service ◆ Master the features and characteristics of products / services <p>6.2 Provide support and advice to customers</p> <ul style="list-style-type: none"> ◆ Answer general enquiries from visiting or calling-up customers on products / services ◆ Use appropriate questioning techniques to identify customer’s needs when they make requests or need help ◆ Understand customers’ questions or needs, and provide them with suitable advice / support, e.g.: <ul style="list-style-type: none"> • Recommend products and alternatives • Quote the product price and compare with similar products • Introduce product features, including the strengths, restrictions, operation, safety devices, etc. • Demonstrate the general operation and using steps of the products • Recommend associated care products and accessories • Seek help from the higher level for difficult questions or queries ◆ Handle customer enquiries on different kinds of products / service effectively ◆ Apply the good knowledge of products and shop facilities of the organisation in answering customers’ general enquiries, e.g.: <ul style="list-style-type: none"> • Locations of and products / services provided by different departments • Provide information on prices, promotions and discounts • Car park location and free parking details • Information on locations, routes and charges of different forms of public transport • Other facilities of the shop / mall, e.g. public telephone and toilet ◆ Explain clearly to the customers the reasons why it is more appropriate to refer their enquiries to other departments <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the advice / support provided satisfies customers’ needs and requirements, and maintain good relationship with customers
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Apply customer service skills, understand customers’ needs, and provide advice and support to their satisfaction.
8. Remark	This UoC is adopted from 105071L1.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Services’

1. Title	Serve customers
2. Code	111328L1
3. Range	This unit of competency (UoC) is applicable to staff responsible for customer service or sales-related work in the retail industry. Practitioners have the ability to use fundamental communication skills to serve customers according to corporate procedures and standard, and understand their needs in order to provide responses.
4. Level	1
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of serving customers</p> <ul style="list-style-type: none"> ◆ Know about the basic knowledge of serving customers, including: <ul style="list-style-type: none"> • Requirements and standard of the organisation on one’s individual appearance • Procedures and standard of the organisation on serving customers • Verbal communication and interpersonal skills ◆ Know about the customers’ psychological condition, preferences and needs for retail products, including: <ul style="list-style-type: none"> • Understand customers’ preference and needs for products through information obtained from conversation with customers • Understand the shopping characteristics of different types of customers • Understand the range of products/service provided by the organisation ◆ Understand the attitude required when handling customers, including: <ul style="list-style-type: none"> • Being polite (e.g. address customers with respect) • Being attentive (e.g. say “morning” when greeting in the morning) • Listening with patience (e.g. summarise key points succinctly) • Being sincere (e.g. demonstrate listening through eye contact, facial expressions, etc.) <p>6.2 Serve customers</p> <ul style="list-style-type: none"> ◆ Make sure the personal appearance meets the established standard of the organisation ◆ Serve customers and make self-introduction according to the established procedure of the organisation, and let the customers experience the serving procedures throughout the shopping process (including entering the shop, shopping and leaving the shop) ◆ Employ communication skills (e.g asking customers questions in an open and direct manner) ◆ Handle customer enquiries or transactions, and/or collect customers’ contact and shopping information <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Follow the requirements of the organisation and maintain the corporate image when serving customers ◆ Possess the customer-oriented service attitude (e.g. address customers with respect to make them feel valued)
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Handle customer inquiries or transactions with the attitude required when receiving customers; and collect customers’ contact and shopping information in accordance with the organisation’s procedures.
8. Remark	This UoC is adopted from 105072L1.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Services’

1. Title	Build up relationship with customers
2. Code	111329L2
3. Range	This unit of competency (UoC) is applicable to customer service staff in the retail industry. Practitioners have the ability to build up relationship with customers according to corporate procedures and standard, understand customers’ purchase needs, provide suitable information to help them choose suitable products, and recommend new products and services to them.
4. Level	2
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of building up customer relationship</p> <ul style="list-style-type: none"> ◆ Understand the importance of good customer relationship ◆ Master the customer service policies and procedures of the organisation ◆ Understand the legal requirements for maintaining customer database ◆ Master the skills of building up customer relationship, e.g.: <ul style="list-style-type: none"> • Communication skills • Personal image • Customer psychology • Dealing with difficult customers ◆ Master basic selling skills <p>6.2 Build up relationship with customers</p> <ul style="list-style-type: none"> ◆ Use all kinds of formal and informal channels to communicate with customers, e.g.: <ul style="list-style-type: none"> • Meeting • Customer hotline (e.g. shown on the receipt) • Email / online conversation / Facebook • Customer feedback form (placed in all retail stores) • Fax ◆ Use appropriate communication skills to build up trust with customers ◆ Identify customers’ purchase needs by: <ul style="list-style-type: none"> • Observing their body language • Asking about how to help them • Accessing the corporate customer database ◆ Provide customer service <ul style="list-style-type: none"> • Leave the customers with good impression • Give accurate information to customers’ enquiries • Provide products to meet customers’ needs • Recommend suitable new products to the customers ◆ Collect information from customers in permitted circumstances according to corporate guidelines for future promotional use (e.g. invite them to be VIP customers) <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Follow corporate guidelines and avoid fraudulent act in building up customer relationship
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Build up relationship with customers, understand their needs and help them choose suitable products.
8. Remark	This UoC is adopted from 105074L2.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Services’

1. Title	Use good communication skills to facilitate transactions
2. Code	111330L2
3. Range	This unit of competency (UoC) is applicable to the staff in the retail industry. Practitioners have the ability to use good communication and interpersonal skills to foster interaction with the customers, so as to gain their trust and commitment and align with the organisation’s retail business development.
4. Level	2
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of communicating with customers</p> <ul style="list-style-type: none"> ◆ Know about the customer relationship strategies of the organisation ◆ Understand the customer service performance criteria of the organisation ◆ Understand the importance of establishing good relationship and fostering positive interaction with customers ◆ Understand the elements of fostering positive interaction with customers, including: <ul style="list-style-type: none"> • Using effective listening and questioning techniques • Understanding and dealing with customers’ needs and complaints • Following the customer relationship strategies • Providing quality service environment ◆ Understand the organisation’s procedures and correct ways of reporting customer feedback and complaints <p>6.2 Use good communication skills to facilitate transactions</p> <ul style="list-style-type: none"> ◆ Have comprehensive interaction with customers according to the customer relationship strategies and guidelines of the organisation, e.g.: <ul style="list-style-type: none"> • Greet and farewell to customers • Recommend organisation’s products and services to customers at the right time • Listen to customers’ needs or enquiries • Listen and take down customer’s feedback or complaints on products or service ◆ Provide service to customers appropriately, including: <ul style="list-style-type: none"> • Communicating with customers in a professional manner according to corporate guidelines (e.g. address customers with respect) • Meeting reasonable requirements of customers within the limit of authority delegated by the organisation • Recording detailed information of customers accurately when necessary while protecting their privacy • Try to get customers’ future contact to help the organisation develop business ◆ According to corporate guidelines, handle emotional and difficult customers appropriately, including: <ul style="list-style-type: none"> • Trying not to stimulate the customers and calm down their emotion • Recommending reasonable solutions that are allowed by the organisation and can effectively compensate the customers as far as possible • Referring the customers to the higher level when necessary while still providing assistance ◆ Ensure that the communication with customers meets the customer service performance criteria established by the organisation <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Communicate with customers and prevent cheating of any kind
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Use customer communication and interpersonal skills to foster positive interaction with customers; and ◆ Gain customers’ trust and commitment so as to help the organisation develop its retail business.
8. Remark	This UoC is adopted from 105075L2.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Services’

1. Title	Implement quality customer service scheme
2. Code	111331L3
3. Range	This unit of competency (UoC) is applicable to customer service staff in the retail industry. Practitioners have the ability to implement customer service management and provide quality service according to the quality customer service scheme, procedures and standards of the organisation so as to satisfy customer needs and develop the retail business of the organisation.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of quality customer service</p> <ul style="list-style-type: none"> ◆ Understand the characteristics and features of the products of the organisation ◆ Understand the customer service scheme of the organisation ◆ Know the definition of quality customer service, including: <ul style="list-style-type: none"> • Difference between quality service and service • Forms of quality service <ul style="list-style-type: none"> ○ Customer perception ○ Customer expectation ○ Discrepancy between standard service and real service ◆ Understand the characteristics of customer service in the retail industry and the elements of retail service management, such as: <ul style="list-style-type: none"> • Customer value-added service • Customer service culture • Customer satisfaction ◆ Understand the rules and skills for retail service staff, such as: <ul style="list-style-type: none"> • Discipline and service code • Communication skills • Personal image • Customer psychology <p>6.2 Implement quality customer service scheme</p> <ul style="list-style-type: none"> ◆ Provide quality service to customers according to customer service standards of the organisation, e.g.: <ul style="list-style-type: none"> • Master factors affecting customer’s choice of products or services • Listen patiently to customers’ enquiries / feedback • Identify customers’ real needs and handle their concerns • Analyse customers’ feedback or complaints • Perform customer service management routines in retail locations • Service quality record management • Customer record and information management • Electronise customer service management, e.g.: <ul style="list-style-type: none"> ○ Web database ○ Confidential database for customer information ◆ Review quality service standards and the quality of customer service provided by the organisation according to changes in market environment, and recommend improvements <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Respect personal privacy when handling personal information of customers, and will not disclose, transfer or re-sell any customer information to the third party without authorisation ◆ Consider the benefit of both the organisation and the customers when implementing the customer service scheme ◆ Build and maintain quality customer service relationship with a sincere attitude and good interpersonal skills

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Implement customer service management according to established corporate procedures; and ◆ Provide quality service and let the customers leave good impression on the products / services of the organisation, in order to strengthen and develop its business.
8. Remark	This UoC is adopted from 105076L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Services’

1. Title	Master consumer psychology and behaviour
2. Code	111332L3
3. Range	This unit of competency (UoC) is applicable to customer service staff in the retail industry. Practitioners have the ability to master consumer behaviour psychology and apply general techniques of promoting and selling products / services to facilitate transaction.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of consumer behaviour</p> <ul style="list-style-type: none"> ◆ Understand the characteristics of individual buyer <ul style="list-style-type: none"> • Cultural factor • Social factor • Personal factor • Psychological factor ◆ Understand the decision making process for buying <ul style="list-style-type: none"> • Buying role <ul style="list-style-type: none"> ○ Initiator ○ Influencer ○ Decider ○ Buyer ○ User • Decision making process for buying <ul style="list-style-type: none"> ○ Awareness of question ○ Data research ○ Assessment of plan ○ Decision of buying ○ Behaviour after buying <p>6.2 Master consumer psychology and behaviour</p> <ul style="list-style-type: none"> ◆ Give suitable advice on products / services according to the characteristics of consumers’ psychology and behaviour in order to facilitate customers’ decision of buying ◆ Analyse the strengths and weaknesses of competitors’ products / services ◆ Master general techniques of promoting and selling products / services <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Possess a customer-oriented service attitude and ensure that the customers are satisfied with the products and services of the organisation
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Master consumer psychology and behaviour, and apply general techniques of promoting and selling products / services to facilitate transaction.
8. Remark	This UoC is adopted from 105078L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Services’

1. Title	Handle customers’ complaints
2. Code	111333L3
3. Range	This unit of competency (UoC) is applicable to customer service staff in the retail industry. Practitioners have the ability to handle customers’ complaints effectively according to the procedures and criteria of the organisation, and follow up to customers’ satisfaction.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of handling customers’ complaints</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s established guidelines and procedures for handling customers’ complaints <ul style="list-style-type: none"> • Quality customer service • Guidelines on handling difficult customers • personnel authorised by the organisation to settle customers’ complaints and their limit of authority • Procedures for referring cases of complaint • Procedures for settling complaints • Understand the products and services of the organisation • Understand retail-related ordinances (e.g. customer rights, consumer rights) ◆ Possess interpersonal relationship and communication skills ◆ Understand the authority and responsibilities of the working position ◆ Master communication and listening skills <p>6.2 Handle customers’ complaints</p> <ul style="list-style-type: none"> ◆ Understand the details and causes of complaints, including: <ul style="list-style-type: none"> • Service or product related • Time of the incident • Location of the incident • Staff involved at that time • Other details concerning the incident ◆ Take appropriate measures to settle the problems in accordance with corporate guidelines <ul style="list-style-type: none"> • Refer the cases to appropriate persons to settle • Offer suitable solutions such as compensation, apology, etc. • Inform the customers about the progress and results, and ensure that they are satisfied • Maintain records of the complaints and devise action plans for improvement, and review regularly to avoid similar problems to occur again <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Possess good manners, rationality, empathy and good listening skills ◆ Use interpersonal communication skills to establish and maintain quality customer service relationship ◆ Consider and balance the interest of the organisation and the customers when handling customers’ complaints
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Master the details and causes of complaints; ◆ Offer suitable solutions to the customers and follow up to their satisfaction; and ◆ Maintain records of the complaints to avoid similar incidents to occur again.
8. Remark	This UoC is adopted from 105079L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Services’

1. Title	Manage customer service performance of frontline staff
2. Code	111334L3
3. Range	This unit of competency (UoC) is applicable to customer service staff in the retail industry. Practitioners have the ability to manage customer service performance of frontline staff; provide basic training and coaching when necessary.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the basic knowledge of customer service</p> <ul style="list-style-type: none"> ♦ Understand consumer expectations of customer service ♦ Understand the organisation’s business policy and established customer service indicators ♦ Acquire a solid understanding of the elements of teamwork (e.g. communication skills, coaching) <p>6.2 Manage customer service performance of frontline staff</p> <ul style="list-style-type: none"> ♦ Work with frontline staff to determine specific, measurable and achievable individual work goals and performance indicators in accordance with the organisation’s business policy and established customer service indicators ♦ Monitor customer service performance in accordance with mutually determined individual work goals and performance indicators ♦ Maintain regular communication with frontline staff, provide objective evaluation of their work performance, compliment and point out areas for improvement ♦ Provide basic training and coaching to frontline staff whose customer service performance is not up to standard <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ♦ Put forward suggestions to superior for optimising customer service in response to market changes. Provide relevant training and follow-up once the suggestions are adopted (e.g. using technology to improve work efficiency) ♦ Maintain communication with staff
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ♦ Work with frontline staff to determine specific, measurable and achievable individual work goals and performance indicators in accordance with the organisation’s business policy and established customer service indicators; ♦ Maintain regular communication with frontline staff, provide objective evaluation of their work performance, compliment and point out areas for improvement; and ♦ Provide basic training and coaching to frontline staff for individual customer service performance / overall improvement.
8. Remark	

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Services’

1. Title	Review products and services to maintain customer satisfaction level
2. Code	111335L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for selling products or customer service in the retail industry. Practitioners have the ability to follow corporate guidelines to ensure that customers are satisfied with the products / services provided by the organisation; and maintain customer satisfaction level by reviewing the products and services regularly.
4. Level	4
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand factors affecting customer satisfaction level</p> <ul style="list-style-type: none"> ◆ Understand the importance of customer relationship and customer service ◆ Master customer service procedures and policies of the organisation ◆ Understand the products / services provided by the organisation or the shop ◆ Understand factors affecting customer satisfaction level: <ul style="list-style-type: none"> ● Characteristics of products / services ● Price of products / services ● Quality stability ● Packaging aesthetics and safety ● Product diversification ◆ Master customer survey and analysis techniques <p>6.2 Review products and services to maintain customer satisfaction level</p> <ul style="list-style-type: none"> ◆ Conduct market research to analyse customer demand and satisfaction level for products / services, such as conducting: <ul style="list-style-type: none"> ● Premium customer survey regularly ● Focus groups/general customer surveys in the retail stores regularly ● Comprehensive surveys in the organisation, branches and all service points ◆ Master the product/service performance data ◆ Compare to the performance of competitors and analyse the market sales strategies ◆ Formulate a product/service enhancement plan based on the market research report, e.g.: <ul style="list-style-type: none"> ● Marketing and promotion strategies ● Image revamp ● Repackage ● Price adjustment ● Placing the product in the right shop or on the right shelf ● Increase inventories ● Internal staff training ◆ Coordinate with all relevant departments to launch the enhancement plan ◆ Monitor product / service performance and satisfaction level, and consider to discontinue products / services which are often poorly performed <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Protect the benefit of the organisation when reviewing the products / services ◆ Review the products or services without any deception or malpractice
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Use market research information to review products / services of the organisation in order to maintain customer satisfaction level.
8. Remark	This UoC is adopted from 105080L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Services’

1. Title	Review customer service scheme
2. Code	111336L4
3. Range	This unit of competency (UoC) is applicable to customer service staff in the retail industry. Practitioners have the ability to assess the customer service scheme and performance indicators effectively according to the strategies and objectives of the organisation so as to improve customer service, develop corporate business and enhance corporate image.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of customer service</p> <ul style="list-style-type: none"> ◆ Understand the business strategies and objectives of the organisation ◆ Understand the customer service scheme and performance indicators of the organisation ◆ Understand the formulation of customer service indicators, such as: <ul style="list-style-type: none"> • Quantification of service indicators (e.g. statistics on complaints/feedback received) • Customers’ standard for quality • Customers’ level of understanding • Service expectation • Deviations between standard quality of customer service and service expectation • Results of improvement in service quality • Service edge <p>6.2 Review customer service scheme</p> <ul style="list-style-type: none"> ◆ Assess the customer service scheme, including its principle, scope, method, procedure, workflow, confidentiality and limitation, etc. ◆ Formulate and quantify performance indicators of customer service, in terms of: <ul style="list-style-type: none"> • Business turnover • Number of visits by the customers • Profit returns • Number of complaints • Proportion of new customers to customer loss, etc. ◆ Formulate an assessment plan for the customer service scheme <ul style="list-style-type: none"> • Scope of assessment • Assessment method • Assessment procedures • Follow-up and improvements in service management ◆ Review the customer service scheme ◆ Formulate a report to improve the service scheme <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Review the customer service scheme according to the strategies and objectives of the organisation ◆ Ensure the customer service of the organisation is provided to customers’ satisfaction
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Assess the customer service scheme and performance indicators according to the objectives of the organisation in order to improve customer service and develop corporate business; and ◆ Formulate a customer service assessment plan.
8. Remark	This UoC is adopted from 105082L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Services’

1. Title	Lead the team to adapt to the renewal and change of the technology system
2. Code	111337L4
3. Range	This unit of competency (UoC) is applicable to customer service management staff in the retail industry. Practitioners have the ability to lead the team to continuously improve the quality of customer service.
4. Level	4
5. Credit	4 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Possess the knowledge in the subject area</p> <ul style="list-style-type: none"> ♦ Understand the latest trends in customer service and experiential retail in phygital context ♦ Grasp the development trends in various technologies in customer service (e.g. virtual assistant assists customers in browsing the website and using self-service, video chat enables staff to solve problems for customers in real time) ♦ Understand the way to help the team adapt to digital transformation <p>6.2 Lead the team to adapt to the renewal and change of the technology system</p> <ul style="list-style-type: none"> ♦ Before the introduction of innovative technology system / solution <ul style="list-style-type: none"> • Lead by example to introduce innovation in responsible work areas and encourage the team to participate in it • Explain the details of the upcoming renewal and change of the technology system to staff (e.g. current challenges, goals for optimisation) ♦ Trial run / parallel run / initial stage of introduction of innovative technology system / solution <ul style="list-style-type: none"> • Explain to staff the procedures for pilot or introduction of innovative technology system / solution • Explain to staff the methods and requirements for collecting business data, information and reports, so as to provide a basis for the complete introduction of innovative technology system / solution • Check staff’s understanding of the renewal and change of the technology system • Once the responses and acceptance level of individual or majority do not meet the expectation: <ul style="list-style-type: none"> ○ Follow up in time and find out the causes ○ Lead staff to analyse the pros and cons and weigh the priorities ○ Help staff to envision the advantages of working together to adapt to the renewal and change of the technology system ♦ After the introduction of innovative technology system / solution <ul style="list-style-type: none"> • Grasp updated information about the market changes, make good use of new technology systems, and lead the team to continuously improve customer service quality • Put forward suggestions to relevant departments (e.g. Information and Technology Department) or suppliers for adjusting and optimising the technology system according to the implementation status <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ♦ Understand staff’s reactions and acceptance level before the renewal and change of the technology system, and take necessary actions to increase the chance of success of the implementation (e.g. participating in the process, incentive allowance, bonus)
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ♦ Explain the details of the upcoming renewal and change of the technology system to staff before the introduction of innovative technology system / solution ♦ Check staff’s understanding of the renewal and change of the technology system in the initial stage

	<p>of introduction of innovative technology system / solution</p> <ul style="list-style-type: none"> ♦ Monitor the development trends in customer service technology; and ♦ Grasp updated information about the market changes, make good use of new technology systems, and lead the team to continuously improve customer service quality.
8. Remark	

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Services’

1. Title	Oversee the channels for collecting customer opinions and analyse the opinions
2. Code	111338L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for customer service in the retail industry. Practitioners have the ability to set up a dedicated team to deal with customer opinions, collect and analyse customer feedback and data analysis results, so as to optimise operation procedures, products and service quality.
4. Level	4
5. Credit	4 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of excellent customer service management</p> <ul style="list-style-type: none"> ♦ Understand the organisation’s business policy and customer service management strategy (e.g. service commitment) ♦ Understand service quality management (e.g. quality service standards) ♦ Understand the data characteristics (e.g. reliability, timeliness, relevance) of various online and offline channels through which the organisation contacts customers ♦ Study how big data analytics can solve business problems <p>6.2 Oversee the channels for collecting customer opinions and analyse the opinions</p> <ul style="list-style-type: none"> ♦ Set up a dedicated team to deal with customer opinions collected from various channels <ul style="list-style-type: none"> • Find out those online and offline channels that the organisation is using to reach customers in order to identify reliable sources of business data, such as: <ul style="list-style-type: none"> ○ Emails (e.g. open rate, number of clicks on links) ○ Hotline (e.g. types of customer inquiries, time required to successfully process customer inquiries) ○ Online activities (e.g., number of times a product is placed in shopping carts, turnover) • Set the conditions and parameters of data analysis with the assistance of relevant departments or suppliers, according to the organisation’s service commitment ♦ Collect and analyse customer feedback and data analysis results <ul style="list-style-type: none"> • Collect the required data from various sources regularly and then import the data so that multiple data sources can be combined to form an effective database • Use simple statistical data to understand the level of customer satisfaction with the organisation’s services • Analyse customer feedback to identify the gap between the actual service quality and the service quality committed by the organisation ♦ Optimise the operation procedures, products and service quality <ul style="list-style-type: none"> • Implement the organisation’s established disclosure programme to improve service and build a culture of quality assurance within the organisation • Monitor the level of service standard on a regular basis • Review the operation procedures, products and service quality, and make corresponding optimisation <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ♦ Take the interests of the organisation and staff into account while ensuring customer satisfaction and quality assurance ♦ Follow or pioneer industry best practices

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ♦ Collect data from various online and offline channels to form an effective database; ♦ Analyse customer feedback to identify the gap between the actual service quality and the service quality committed by the organisation; and ♦ Review the operation procedures, products and service quality, and make corresponding optimisation.
8. Remark	

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Services’

1. Title	Establish customer service performance criteria
2. Code	111339L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for policy formulation in the retail industry. Practitioners have the ability to establish and implement a suitable set of customer service performance criteria according to the customer relationship strategies of the organisation in order to enhance its image and retail business.
4. Level	5
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of customer service performance criteria</p> <ul style="list-style-type: none"> ◆ Understand the customer relationship strategies of the organisation ◆ Master the personnel and resource allocation involved in carrying out customer service by the organisation ◆ Understand customer requirements on retail products, e.g.: <ul style="list-style-type: none"> • Range of product (Is it complete?) • Product quality (Is it good among similar products?) • Whether the product is timely (e.g. clothing or accessories) • Product price (Is it competitive?) ◆ Understand customer requirements on the retail service provided, e.g.: <ul style="list-style-type: none"> • Is the staff always courteous to customers? • Are customer enquiries always answered? • Can the customer pledge be fulfilled? • Are customers’ special needs or requirements taken care of? ◆ Master the general customer service performance indicators for retail business <p>6.2 Establish customer service performance criteria</p> <ul style="list-style-type: none"> ◆ Establish the service scope and standard according to the customer relationship strategies of the organisation ◆ Analyse customer feedback and identify customers’ requirements on the services of the organisation ◆ Set the objectives of quality guarantee for customer service of the retail business ◆ Analyse the operation and requirements of different business units in order to set the customer service quality standard ◆ Enable staff of different departments to understand and master the established customer service performance criteria through various effective communication channels ◆ Implement total quality management in customer service routines ◆ Plan measures to ensure a smooth implementation of customer service, including: <ul style="list-style-type: none"> • Organising activities to enhance staff’s understanding of the customer service pledge • Organising staff training activities to enhance the awareness of quality management policies and scheme • Identifying staff training needs in product management • Enhancing the cultural quality of staff through training and other activities to ensure consistency of services provided ◆ Plan measures to promote “quality first” culture, including: <ul style="list-style-type: none"> • Establishing excellent service award schemes, quality service awards, etc. • Launching quality service activities to strengthen the relationship with customers and expand business opportunities ◆ Analyse customer service performance information and compare with the established standard and performance indicators in order to identify areas in quality management that need to be strengthened <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Follow the established customer relationship strategies of the organisation in setting and implementing the customer service performance criteria ◆ Protect the overall interests of the organisation and the customers

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Analyse customer requirements, service performance and operating needs of different units in order to set the customer service performance criteria; and ◆ Enable staff of different levels to understand the customer service performance criteria through various communication channels, and organise suitable activities according to different staff training needs in order to promote the quality indicators and culture.
8. Remark	This UoC is adopted from 105083L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Services’

1. Title	Establish quality guarantee for customer satisfaction
2. Code	111340L5
3. Range	This unit of competency (UoC) is applicable to customer service staff in the retail industry. Practitioners have the ability to formulate a customer service quality guarantee mechanism for the organisation to ensure that customers receive the best quality customer service and promote good corporate image.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of quality customer service management</p> <ul style="list-style-type: none"> ◆ Understand corporate business strategies and objectives ◆ Understand customer service strategies of the organisation ◆ Understand service quality management (e.g. quality service standard) ◆ Understand factors affecting service quality <ul style="list-style-type: none"> ● Customer satisfaction level ● Customer loyalty ● Total Quality Management culture ◆ Understand customer service performance indicators, e.g.: <ul style="list-style-type: none"> ● Quantification of performance indicators ● Customers’ standard of service quality ● Customers’ level of understanding ● Service expectation ● Deviations between service standard and service expectation ● Pledged level of service <p>6.2 Establish quality guarantee for customer satisfaction</p> <ul style="list-style-type: none"> ◆ Use the survey statistics to understand customer’s level of satisfaction towards a particular service of the organisation ◆ Analyse the gap between real service quality and the service quality pledged by the organisation ◆ Set the quality service standard of the organisation, e.g.: <ul style="list-style-type: none"> ● Staff’s service level pledge ● Return guarantee ◆ Establish an information disclosure scheme to improve service and build the corporate culture of quality guarantee ◆ Formulate quality monitoring to monitor the service level standard ◆ Formulate training programmes on quality guarantee for customers so that employees of different levels can have the opportunity to receive training ◆ Formulate service quality review and enhancement procedures <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Take care of the benefit of both the customers and the organisation when formulating quality guarantee for customer satisfaction
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Base on the survey statistics to find out the inadequacies in the organisation’s service quality; and ◆ Formulate a service quality guarantee mechanism to meet the expectation of customers and to develop corporate business.
8. Remark	This UoC is adopted from 105084L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Services’

1. Title	Formulate customer service scheme
2. Code	111341L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for policy formulation in the retail industry. Practitioners have the ability to formulate customer service scheme to provide quality service according to the operational policy of the organisation and the market trend, so as to enhance the corporate image and business.
4. Level	5
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of customer service scheme</p> <ul style="list-style-type: none"> ◆ Understand the criteria and requirements on high quality customer service of the retail industry ◆ Understand the strengths of and challenges faced by the organisation ◆ Understand policy and future development of the organisation on providing service ◆ Understand the changes in the industry and market environment ◆ Understand the effect of government policy and measures on the retail industry and the formulation of customer service scheme (e.g. the individual visit scheme for mainland residents) ◆ Understand similar measures on customer service implemented by competitors <p>6.2 Formulate customer service scheme</p> <ul style="list-style-type: none"> ◆ Formulate customer service scheme for the retail industry according to the operational policy of the organisation and the market trend, e.g.: <ul style="list-style-type: none"> • Design service operation system <ul style="list-style-type: none"> ○ System blueprint and framework ○ Key service personnel scheme • Formulate routine operation scheme for the organisation <ul style="list-style-type: none"> ○ Code of practice and staff discipline for customer service ○ Workflow and steps for designing retail services ○ Service environment management, such as the hygiene, lighting and cosiness of retail store • Position the customer service of the organisation and identify target customer groups • Formulate online customer service scheme for the organisation <ul style="list-style-type: none"> ○ Corporate retail website’s databank ○ Procedures for handling online sales enquiries • Establish customer service assessment mechanism (e.g. rewarding and penalty mechanism for staff) and formulate operations strategies with relevant plans ◆ Monitor the market changes and adjust the customer service scheme ◆ Monitor the changes in customer service made by competitors, and adjust the customer service scheme accordingly <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Protect the overall benefit of both the organisation and the customers when formulating customer service scheme ◆ The service scheme formulated should comply with relevant legal requirements, e.g. Personal Data (Privacy) Ordinance
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Formulate customer service scheme according to the operational policy of the organisation and the market trend to strengthen and develop the retail business of the organisation; and ◆ Monitor the market changes of the retail industry and adjust the customer service scheme accordingly in order to enhance competitiveness.
8. Remark	This UoC is adopted from 105085L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Services’

1. Title	Formulate customer relationship management strategies
2. Code	111342L6
3. Range	This unit of competency (UoC) is applicable to staff responsible for policy formulation in the retail industry. Practitioners have the ability to formulate effective customer relationship management (CRM) strategies according to corporate mission and objectives, so as to retain existing customers, attract new customers and find potential customers to develop retail business.
4. Level	6
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of CRM strategies</p> <ul style="list-style-type: none"> ◆ Understand CRM theory, including: <ul style="list-style-type: none"> • Market and customer orientation of the industry • Benefit of good customer relationship • Objectives of developing customer relationship <ul style="list-style-type: none"> ○ Retain existing customers ○ Win new customers ○ Maximise customer profits ◆ Understand the generality and uniqueness of the customers in the retail industry ◆ Understand customer relationship in the retail industry, including: <ul style="list-style-type: none"> • Deal management strategy • Relationship management strategy, such as: <ul style="list-style-type: none"> ○ Partnership ○ Consultant and problem solver ○ Affiliation (corporate customers) ○ Functional relationship • Strategic role of product supplier in customer promotion ◆ Understand the corporate strategy of managing customer information system <p>6.2 Formulate CRM strategies</p> <ul style="list-style-type: none"> ◆ Formulate effective CRM strategies according to the corporate objectives <ul style="list-style-type: none"> • Formulate the CRM framework • Formulate methods, procedures and workflow of maintaining CRM, such as: <ul style="list-style-type: none"> ○ Customer screening criteria ○ Loyal customer programme ○ Frequent launch of focus groups ○ Ways to explore new customers ○ Criteria for classification of customers ○ Assessment and remedies for customer churn ○ Handling and follow-up procedures for customer complaints • Make use of the advantage in customer relationship to establish and maintain long-lasting customer relationship in order to keep the loyalty of customers to products / services of the organisation • Formulate the revamping strategy for customer relationship, e.g.: <ul style="list-style-type: none"> ○ Review of customer relationship ○ Development of the retail market ○ Pledge of customer relationship and form of feedback ○ Methods to review and strengthen customer relationship • Apply customer database technology to implement customer relationship strategies, such as: <ul style="list-style-type: none"> ○ Setting up of computer system procedures ○ Analysis of customer relationship and business opportunities

	<ul style="list-style-type: none"> ○ E-commerce network ○ Online market promotion ○ Development and upgrade of relevant computer hardware and software ◆ Review the corporate CRM strategies regularly and assess the effect of the effectiveness of customer relationship operation on the organisation <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Formulate CRM strategies for the benefit of both the organisation and the customers ◆ Consider and formulate CRM strategies according to the Personal Data (Privacy) Ordinance
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Master professional knowledge of CRM; and ◆ Formulate effective CRM strategies, review and consolidate information and data, and make analysis, judgement and assessment according to the corporate objectives in order to enhance business development, which benefits the development of the organisation in the long run.
8. Remark	This UoC is adopted from 105086L6. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Customer Services’

1. Title	Formulate customer service management strategies
2. Code	111343L6
3. Range	This unit of competency (UoC) is applicable to staff responsible for policy formulation in the retail industry. Practitioners have the ability to formulate effective customer service management (CSM) strategies according to corporate mission and objectives, in order to meet customer needs and enhance corporate image and retail business development.
4. Level	6
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of customer service strategies</p> <ul style="list-style-type: none"> ◆ Understand the importance of formulating customer service strategies ◆ Understand CSM theory, such as: <ul style="list-style-type: none"> • Total customer service package • Concept of service market (e.g. market opportunity) • Strategies of service operation (e.g. resources allocation analysis) • Delivery of Total Service Package • Identifying target customers • Customer service and communication management matrix • Service demand and supply strategy • Measurement of service quality ◆ Understand the service level / standard of competitors/the industry in order to make a comparison <p>6.2 Formulate CSM strategies</p> <ul style="list-style-type: none"> ◆ Apply professional CRM knowledge to formulate effective customer service market matrix strategy according to corporate objectives <ul style="list-style-type: none"> • Formulate CRM plans, such as: <ul style="list-style-type: none"> ○ Service management operation ○ Services Process Matrix ○ Content, package, quality and pricing of service ○ Customer service promotion strategy ○ Electronic and internet service strategy ○ Customer service communication matrix strategy • Formulate external and internal service management logic strategies to change the service culture of the organisation <ul style="list-style-type: none"> ○ Strategies to change the organisational structure or system (e.g. recruitment, training, reward and penalty, staff commitment) ○ Master the scope of customer service audits (e.g. customers, staff, the management, the public) • Identify shortcomings of service according to the service quality benchmarks, and formulate structural quality improvement strategies to put forward the customer service quality assurance ◆ Audit the investment in customer service and anticipate the short-term and long-term returns in order to formulate customer service strategies ◆ Formulate long-term customer service development and global customer service strategies, e.g.: <ul style="list-style-type: none"> • Develop local customer service strategies <ul style="list-style-type: none"> ○ Single / diversified products strategy ○ Centralised or district diversification strategy • Franchise • Customer service strategy for Mainland China or overseas <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Formulate CSM strategies for the benefit of both the organisation and the customers ◆ Consider and formulate CSM strategies according to the Personal Data (Privacy) Ordinance

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Formulate effective CSM strategies according to corporate mission and objectives in order to meet customer needs; and ◆ Formulate effective CSM strategies to enhance corporate brand image, profits and business development, which benefits the development of the organisation in the long run.
8. Remark	This UoC is adopted from 105087L6. The UoC title is revised.

Units of Competency for 'Store Operations'

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Implement hygiene procedures
2. Code	111344L1
3. Range	This unit of competency (UoC) is applicable in retail-related workplace. It involves daily routine operations. Practitioners have the ability to follow the code of practice for personal hygiene to implement general sterilisation and cleaning according to the organisation’s hygiene procedures and guidelines.
4. Level	1
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of public health</p> <ul style="list-style-type: none"> ◆ Know about the concept of infectious diseases and the principles of preventing and controlling them ◆ Understand the importance of maintaining the hygiene of store ◆ Know about the organisation’s established hygiene procedures and measures, e.g.: <ul style="list-style-type: none"> • Personal hygiene of employees • Food hygiene (including storage and handling of food) • Environmental hygiene and purification • Hygiene of devices and equipment, etc. ◆ Understand the types of infectious diseases and their preventive measures <ul style="list-style-type: none"> • Food poisoning and contamination (e.g. salmonella) • Harms (e.g. Dengue fever) caused by insects (e.g. mosquitoes, cockroaches) • Harm caused by bacteria and viruses (e.g. H5N1 avian influenza, severe acute respiratory syndrome (SARS), Hepatitis) ◆ Know about sterilisation methods and procedures applicable in the retail industry (e.g. disinfectants and bleach) ◆ Understand the existing legislations and guidelines related to public health and occupational safety and health, e.g.: <ul style="list-style-type: none"> • Occupational Safety and Health ordinance • Food safety Ordinance • Public Health and Municipal Services Ordinance <p>6.2 Implement hygiene procedures</p> <ul style="list-style-type: none"> ◆ Follow the organisation’s established hygiene procedures and measures during daily operations to prevent the spread of infectious disease, including: <ul style="list-style-type: none"> • Personal hygiene <ul style="list-style-type: none"> ○ Hand washing skills ○ Steps of wearing and removing personal protective equipment (e.g. facial mask) ○ Maintain etiquette when coughing ○ Specific requirements for food handling employees on personal hygiene • Hygiene of workplace and equipment <ul style="list-style-type: none"> ○ Hygiene of displays (e.g. keeping the shelves clean and packages of products intact (particularly for food)) ○ Hygiene of premises (e.g. ventilation system, room temperature) ○ Food hygiene (e.g. storage, handling and expiry date of raw and cooked food) ○ Hygiene of equipment and devices ◆ Report to superiors when hygiene problems occur in order to ensure that preventive measures can be taken according to the organisation’s hygiene procedures and guidelines or report to statutory bodies <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Follow public health ordinances and guidelines in daily operations
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Follow related hygiene ordinances and the organisation’s established code of practice for personal and work hygiene in daily operations to ensure the cleanliness and hygiene of workplace and facilities in order to prevent the spread of infectious disease.
8. Remark	This UoC is adopted from 105116L1.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Perform retail sales system clearing
2. Code	111345L2
3. Range	This unit of competency (UoC) is applicable to staff responsible for cash settlement in the retail industry. Practitioners have the ability to complete related work within specified time according to established codes and procedures for retail sales system clearing of the organisation.
4. Level	2
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of retail sales system clearing</p> <ul style="list-style-type: none"> ◆ Understand the code of practice and operating procedures of retail sales system clearing, including: <ul style="list-style-type: none"> ● Handling deposits, withdrawals and balance ● Handling cash and non-cash items ● Security for the property being kept ● Handling disposable cash ● Operating the retail sales system and its ancillary devices ◆ Understand the ways to handle cash and non-cash items, including: <ul style="list-style-type: none"> ● How to turn on and off the retail sales system ● Retail sales system clearing, e.g. clearance and transfer ● Maintaining cash flow ● Counting cash and non-cash items ● Auditing non-cash papers ● Recording withdrawn and deposited amount and balance ● Handling credit cards and cheques ◆ Master the legislations and regulatory codes on business transactions imposed by the Government and regulators ◆ Master the clearing methods of the retail sales system, e.g.: <ul style="list-style-type: none"> ● Manual method ● Electronic method ● Clearing done by dedicated operator / expert ● Clearing done at specified time / closing time on a daily basis <p>6.2 Perform retail sales system clearing</p> <ul style="list-style-type: none"> ◆ Operate the retail sales system according to the code of practice and operating procedures ◆ Handle cash, withdrawals and cash flow according to established procedures ◆ Record the data and information of the retail sales system accurately ◆ Verify the records and clearing information of the retail sales system, including: <ul style="list-style-type: none"> ● Checking related documents, e.g. the memorandum, invoice and receipt of financial transactions ● Checking signed credit card slips ● Checking the automatic printout with all the items listed by the retail sales system ◆ Stop the system if there is any problem, and report to the high level and ask the maintenance company for repair <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Prevent any form of cheating or malpractice when performing retail sales system clearing
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Perform retail sales system clearing within the specified time according to relevant codes and procedures established by the organisation; and ◆ Verify the records and clearing information of the retail sales system and if in doubt, report to the high level immediately.
8. Remark	This UoC is adopted from 105119L2.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Replenish shelves
2. Code	111346L2
3. Range	This unit of competency (UoC) is applicable to store staff responsible for handling goods in the retail industry. Practitioners have the ability to work in routine conditions, and to replenish shelves timely and under special conditions according to established procedures and guidelines of the organisation so as to ensure sufficient supply of products and smooth daily operation of the store.
4. Level	2
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of shelf replenish</p> <ul style="list-style-type: none"> ◆ Know about the policy of shelf replenish of the organisation ◆ Understand the procedures and codes of shelf replenish of the organisation <ul style="list-style-type: none"> • Verify product identification code or product code • Confirm the positions of product shelves • Check product prices • Check expiry date • Record the types and quantities of products replenished ◆ Know about the factors for shelf replenish, e.g. : <ul style="list-style-type: none"> • Stock volume • Product delivery schedule • Size and packing of products ◆ Understand the purpose and the importance of keeping sufficient products on shelves ◆ Know about the common types of shelves and their characteristics (e.g. layer-type, rotary-type and drawer-type) ◆ Know about the code of occupational safety and health, and relevant requirements, e.g.: <ul style="list-style-type: none"> • Manual operation • Procedures for handling dangerous goods • Stacking of goods • Procedures for maintaining food hygiene <p>6.2 Replenish shelves</p> <ul style="list-style-type: none"> ◆ Replenish shelves on time according to the schedule, procedures and codes, and the actual sales and demand <ul style="list-style-type: none"> • Maintain sufficient products on shelves • Follow the instructions for product storage (e.g. required temperature and humidity) ◆ Take and receive goods from the warehouse according to established procedures for shelf replenish ◆ Replenish shelves according to established procedures in response to breaking events (e.g. promotional and reduction sales) <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Follow the codes and requirements related to occupational safety and health when replenishing shelves
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Replenish shelves according to established procedures and guidelines of the organisation so as to ensure the provision of sufficient products for sale.
8. Remark	This UoC is adopted from 105120L2.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Commit to the work of the retail team
2. Code	111347L2
3. Range	This unit of competency (UoC) is applicable to staff working in retail stores. Practitioners have the ability to commit to the retail team of the organisation and work actively under daily working environment to help build the team spirit.
4. Level	2
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of retail team</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s requirements for staff as members of the retail team, e.g.: <ul style="list-style-type: none"> • Work diligently • Follow the instructions of the higher level • Get along with colleagues • Bring out the team spirit ◆ Understand the major obstacles for blending in the retail team, e.g.: <ul style="list-style-type: none"> • Discriminating others (racial or disability discrimination) • Bullying • Harassment (sexual harassment) • Adopt an uncooperative attitude toward colleagues and undermine team spirit ◆ Understand relevant legislations and regulations imposed by the government and governing bodies, including: <ul style="list-style-type: none"> • Anti-discrimination Ordinance • Personal Data (Privacy) Ordinance • Disability Discrimination Ordinance • Race Discrimination Ordinance • Codes of Practice on Employment ◆ Master the method and skills of communicating with the higher level and colleagues and treat others politely <p>6.2 Commit to the work of the retail team</p> <ul style="list-style-type: none"> ◆ Commit to daily work of the retail team with a cooperative attitude, e.g.: <ul style="list-style-type: none"> • Follow the instructions of supervisor • Respect colleagues’ opinions and doings • Consider the interests of the organisation first • Maintain a harmonious working atmosphere • Follow the organisation’s codes of practice and guidelines ◆ Comply with related legislations and guidelines of the organisation, including those of anti-discrimination, bullying and harassment ◆ Actively respond to colleagues’ requests by considering whether or not: <ul style="list-style-type: none"> • Your workload is allowable • Those are your job duties • The relationship of mutual cooperation could be maintained • It is helpful to the organisation ◆ Solve problems of work with colleagues with a cooperative attitude and offer help ◆ Explain to colleagues the reason for not offering immediate help ◆ Seek for guidelines and help from the higher level as soon as possible when a dispute occurs in the team that is difficult to mediate ◆ Take the initiative to improve your work performance, including: <ul style="list-style-type: none"> • Learn from outstanding colleagues at work • Attend training courses that can provide retail knowledge and improve performance • Ask superiors and colleagues about their comments / opinions on your performance <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Commit to the work of the retail team, consider the interests of the team first and participate in building a harmonious working environment

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Blend in with the retail team of the organisation and actively commit to the work; and ◆ Demonstrate the team spirit in order to improve the morale of colleagues in the retail store.
8. Remark	This UoC is adopted from 105124L2.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Process orders
2. Code	111348L2
3. Range	This unit of competency (UoC) is applicable to staff working in retail stores. Practitioners have the ability to process customer orders according to the organisation’s established procedures.
4. Level	2
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of processing orders</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s general methods and procedures for processing goods orders <ul style="list-style-type: none"> • Unify the operations and arrangements of the orders processing system • Tools required (e.g. trolley, packing materials) • Choose and process the goods • Calculate, verify and record the price and quantity of goods ordered ◆ Master the problems that may occur during processing of orders and their solutions ◆ Understand the legislations of the government and the governing bodies for processing goods orders, e.g.: <ul style="list-style-type: none"> • Sale of Goods Ordinance • Code of Practice on Procurement of Supplies, Goods and Services <p>6.2 Process orders</p> <ul style="list-style-type: none"> ◆ Process the customer order according to the organisation’s established procedures, including: <ul style="list-style-type: none"> • Filling in the information required accurately, including the customer’s name, address and telephone, type and quantity of the goods, etc. • Reading the content and requirements of the order carefully • Choosing and use appropriate tools to help the selection and packing of goods ordered by the customer • Adopting effective preventive measures to avoid mistakes that may occur in choosing and processing goods (e.g. inappropriate way of handling fragile goods) • Reporting to the higher level immediately for abnormal or special situation • Filing the processed orders ◆ Ensure that the organisation handles the goods in a legitimate situation if the goods ordered are of special nature (e.g. controlled items, dangerous items); seek instructions from the higher level if necessary ◆ Report to the higher level regularly on the status of processing goods orders <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure the consistency in treating all customers and the provision of quality customer service when processing orders, and handle the goods ordered by the customer within the time specified
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Process customer orders according to the established guidelines and procedures of the organisation; and ◆ Ensure that the goods ordered are delivered to the address given by the customer within the specified time.
8. Remark	This UoC is adopted from 105127L2.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Handle cash and credit card transaction payment
2. Code	111349L2
3. Range	This unit of competency (UoC) is applicable to staff responsible for handling transaction payment in the retail industry. Practitioners have the ability to handle cash and credit card transaction payments according to the organisation’s established procedures in daily and routine operations so that transactions can be conducted smoothly.
4. Level	2
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of cash and credit card transaction payment</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s established procedures for handling cash and credit card payment, e.g.: <ul style="list-style-type: none"> • Acceptable cash currency (e.g. Hong Kong dollars, Renminbi, other foreign currencies) • Acceptable credit card category (e.g. VISA Card, Master Card, UnionPay Card) • Acceptable credit card / cash payment amount (if any) • Electronic money (e.g. stored value card, e-wallet) ◆ Understand fraudsters’ general tricks ◆ Understand the security features of real banknotes and real credit cards ◆ Understand the legitimate rights and interests of the credit of customers and retailers ◆ Understand the operational procedures of the organisation’s automatic pay system <p>6.2 Handle cash and credit card transaction payment</p> <ul style="list-style-type: none"> ◆ Handle transactions paid by cash and credit card in daily and routine operations, and ensure that various forms of transactions (e.g. payment / change of money, cancellation / alteration, debit) are carried out ◆ Record the customer’s payment or the amount of the change accurately and promptly in the organisation’s automatic pay system ◆ Verify that the amount paid by the customer / the amount of the change is correct ◆ Handle the received payment, reprint and transaction record according to corporate guidelines ◆ Seek instructions from the higher level immediately when encountering fraudulent payment practices (e.g. fake credit card / counterfeit banknote) or in doubt <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Process payment transactions in the manner required to receive customers (e.g. address customers with respect)
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Handle customer’s cash and credit card transaction payment according to the organisation’s established procedures; and ◆ Record the payment / change amount promptly in the organisation’s automatic pay system.
8. Remark	This UoC is adopted from 105128L2.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Implement work safety guidelines
2. Code	111350L2
3. Range	This unit of competency (UoC) is applicable to staff working in retail stores. Practitioners have the ability to implement the organisation’s established safety guidelines in daily routine operations.
4. Level	2
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of work safety guidelines</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s established occupational safety and health policy and related guidelines ◆ Understand general codes of practice and monitoring measures for work safety in the retail industry ◆ Understand government legislations related to occupational safety and health, e.g.: <ul style="list-style-type: none"> • Occupational Safety and Health Ordinance • Factories and Industrial Undertakings Ordinance • Fire Services Ordinance • Dangerous Goods Ordinance ◆ Understand basic safety guidelines for general workplace in Hong Kong, e.g.: <ul style="list-style-type: none"> • Safe use of electricity • Fire service installations and equipment and safety measures • Basic knowledge of first aid • Knowledge of office/workplace safety <p>6.2 Implement work safety guidelines</p> <ul style="list-style-type: none"> ◆ Implement the organisation’s established occupational safety and health policy and related guidelines during daily operations, including: <ul style="list-style-type: none"> • Always pay attention to occupational safety and insist to work under safe and healthy situation • Pay attention to the safety of machine/electrical equipment operation • Pay attention to personal hygiene and correct posture while working • Prevent/reduce accidents while at work • In case of an accident, implement contingency measures under supervision ◆ Assist retail site management staff to implement work safety guidelines, and report to the higher level once observing any occupational safety and health hazard ◆ Regularly exercise the occupational safety and health measures (e.g. fire drill) <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that under no circumstances would the safety guidelines not to be followed for the sake of convenience or in a hurry ◆ Ensure the compliance with relevant legal requirements in the implementation of work safety guidelines
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Implement the organisation’s established work safety guidelines; and ◆ Work in safe environment in order to prevent/reduce accidents.
8. Remark	This UoC is adopted from 105129L2.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Keep the retail environment clean and tidy
2. Code	111351L2
3. Range	This unit of competency (UoC) is applicable to staff working in retail stores. Practitioners have the ability to keep the retail stores environment clean and hygienic according to established standards and working guidelines for cleanliness and hygiene in order to prevent accidents and protect the corporate image.
4. Level	2
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of clean and tidy retail environment</p> <ul style="list-style-type: none"> ◆ Understand accidents that may be caused by poor management of the retail environment (e.g. slip, trip, collision, wounded by falling goods) ◆ Know about the organisation’s established standards and measures for keeping the environment clean and tidy, e.g.: <ul style="list-style-type: none"> • Workplace area (passages, corridors) • Product shelves and display items • Packing of goods/foods • Tools and equipment ◆ Understand the importance of keeping the retail environment clean and hygienic to corporate image and business ◆ Know about general ways of workplace housekeeping and their advantages (e.g. 5S: Organisation, Standardisation, Neatness, Cleanliness and Discipline) ◆ Know about relevant occupational safety and health codes, e.g.: <ul style="list-style-type: none"> • Work safety • Handling of dangerous goods <p>6.2 Keep the retail environment clean and tidy</p> <ul style="list-style-type: none"> ◆ Implement established measures in daily routines according to the organisation’s requirements and standards for cleanliness and hygiene of the environment in order to keep the retail environment clean and hygienic, including: <ul style="list-style-type: none"> • Environment outside the store <ul style="list-style-type: none"> ○ Clean store signboards and windows ○ Clean up trash and obstacles • Environment inside the store <ul style="list-style-type: none"> ○ Keep the floor/mat clean, dry and flat ○ Keep the passages and corridors unblocked ○ Items are neatly and securely placed ○ Equipment and monitors are not dusty ○ Items should not be stacked too high ○ Store dangerous items/materials according to work instructions ◆ Use various tools and equipment according to work instructions when cleaning the environment so as to prevent accidents (e.g. personal protective equipment, ladder / step stool, cleaning tools) ◆ In case of emergency, carry out cleaning and remedial measures according to corporate guidelines and measures without affecting daily business operation or causing any danger to customers and staff, e.g.: <ul style="list-style-type: none"> • Handle spilled liquid and fragments • Place umbrella bags, umbrella holders, non-slip mats <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Keep the retail environment clean, tidy and hygienic in order to provide a comfortable shopping environment for customers

7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Adopt appropriate measures according to corporate requirements to ensure that the retail environment is clean and tidy to avoid causing any danger to customers and staff and to maintain the corporate image and normal business operation.
8. Remark	This UoC is adopted from 105130L2.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Implement store design plan
2. Code	111352L3
3. Range	This unit of competency (UoC) is applicable to staff in the retail industry. Practitioners have the ability to implement the organisation’s store and window design plan and provide a safe shopping environment for customers and promote the organisation’s retail business.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of store design plan</p> <ul style="list-style-type: none"> ◆ Understand the business strategies and marketing plan of the organisation ◆ Master the details of the store and window design plan of the organisation, including: <ul style="list-style-type: none"> • Actual layout of design • Groups of customers targeted by the design plan • Message expressed by the design plan • Considerations for corporate image ◆ Master the actual environment of the store design plan, including: <ul style="list-style-type: none"> • Space of the site, e.g. area, height • Facilities of the site, e.g. lighting, power supply audio effect, etc. • Installations of the site, e.g. ceilings, raised platform and fixtures e.g. changing room • Limitations in the use of the site (e.g. size of the volume) • Time limitations, e.g. whether can be placed 24 hours or not ◆ Understand the resources required for the implementation of the store design plan ◆ Understand government ordinances and regulations for the implementation of the store design plan (e.g. Buildings Ordinance, Code of Practice for the Provision of Means of Escape in Case of Fire) ◆ Understand the competitive environment faced by the organisation and competitors’ sales practices <p>6.2 Implement store design plan</p> <ul style="list-style-type: none"> ◆ Apply the knowledge of the store design plan in the daily work, e.g.: <ul style="list-style-type: none"> • Seek clear guidelines from the higher level on business and talent strategies, targeted market, customer groups, etc. • Measure the usable space and area of the site • Make a sketch or model of the proposed appearance of the store and windows • Prepare the configuration plan to include the details of layout design, expected customer flow and needs, fixtures, budget, etc. ◆ Put the goods in places/on the shelves securely according to the design plan to promote the organisation’s retail business ◆ Record the appearance of the store and windows designed, e.g. take photographs or save at computer ◆ Collect customers’ impressions and comments on the store and window design through effective channels ◆ Improve the design plan according to comments collected <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Implement the store design plan to ensure that the design complies with the legal requirements on fire services (e.g. Code of Practice for Minimum Fire Service Installations and Equipment)
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Guide and supervise staff to implement the store design plan in accordance with the established procedures, guidelines, and instructions in order to provide customers with a safe shopping environment and assist in promoting the organisation’s retail business.
8. Remark	This UoC is adopted from 105131L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Implement shop security procedures
2. Code	111353L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for security matters in the retail industry. Practitioners have the ability to implement shop security procedures and arrangements of the organisation so as to avoid goods/properties loss and safeguard the benefits of the organisation.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of shop security</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s shop security procedures and arrangements ◆ Master the organisation’s shop security procedures and related details, including: <ul style="list-style-type: none"> • Manpower arrangements (e.g. to be responsible by the staff or to employ professional security guards) • Application of security equipment and where the equipment put • Theft prevention / handling procedures (e.g. report to the police) • Prevention / handling procedures for other security matters (e.g. false statement during the transaction, malicious damage of goods) ◆ Understand the application of the security equipment installed in the store, including: <ul style="list-style-type: none"> • Infra-red alarm system • Radio frequency identification (RFID) system • Closed-circuit television • Communication equipment (e.g. walkie-talkie, speaker) ◆ Understand the ordinances, codes of practice and other related guidelines for security of retail stores imposed by the government and governing bodies <p>6.2 Implement shop security procedures</p> <ul style="list-style-type: none"> ◆ Arrange appropriate manpower to take up different security jobs in the store ◆ Follow government ordinances and regulatory guidelines when implementing shop security procedures, e.g.: <ul style="list-style-type: none"> • Comply with the privacy ordinance when checking handbags of the staff/customers • Take into account the fire services ordinance when placing the security equipment, e.g. do not lock the escape door ◆ Follow the established procedures and ways to implement the above-mentioned shop security tasks ◆ Monitor the security tasks continuously and look for potential loopholes in security by means of the following: <ul style="list-style-type: none"> • Site observation at the workplace • Role-play to collect information • Report obtained from a third party • Staff and customer opinions • Questionnaire or interview to get the answers, etc. ◆ Report the monitoring results regularly to the higher level and propose improvements ◆ Communicate with staff of all levels on security matters through effective channels ◆ Cooperate and liaise with external bodies, e.g. security companies, Police Department, etc. <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Implement shop security procedures according to the ordinances and codes of practice for security imposed by the government and regulatory bodies
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Guide and supervisor staff to implement shop security procedures and arrangements; and ◆ Report potential loopholes in security to the higher level during the implementation of shop security procedures and propose improvements; or make appropriate responses and adjustments according to the actual situation.
8. Remark	This UoC is adopted from 105132L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Deploy staff
2. Code	111354L3
3. Range	This unit of competency (UoC) is applicable to personnel management staff in the retail industry. Practitioners have the ability to make recommendations to management level on staff deployment and implement them according to the change in organisation’s manpower structure, the performance and development aspiration of staff, so as to bring out their strengths and facilitate the development of the organisation.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of human resources management</p> <ul style="list-style-type: none"> ◆ Understand basic human resources management concepts ◆ Understand the organisational structure and the area of work and duties of all ranks of the organisation, such as: <ul style="list-style-type: none"> • Cashier • Sales person • Promoter • Customer service officer • Tally clerk • Warehouse supervisor ◆ Understand the human resources management policies of the organisation, including: <ul style="list-style-type: none"> • Recruitment and appointment • Job nature analysis • Salary management • Performance management • Staff training ◆ Understand different forms and principles of staff deployment, including: promotion, secondment, posting, etc. ◆ Understand the benefits of internal selection and promotion, such as: <ul style="list-style-type: none"> • Enhancing staff’s learning and working initiative • Fostering staff’s sense of belonging to the organisation ◆ Understand the effects of staff deployment on the organisation on the operational cost, change in organisational structure, etc. <p>6.2 Deploy staff</p> <ul style="list-style-type: none"> ◆ Decide on manpower demand according to the current and long-term human resources policies of the organisation ◆ Make recommendations to the management level on staff deployment and implement them according to daily operational needs <ul style="list-style-type: none"> • Review the operational needs of the stores and staff’s abilities and strengths to decide on the number of staff to be deployed • Deploy staff to suitable positions so as to bring out their strengths • Make deployment or secondment or recruit temporary staff to meet seasonal, operational or urgent needs ◆ Deploy staff to suit the long-term human resources plan <ul style="list-style-type: none"> • Review regularly related factors of all kinds so as to assess future manpower demand, including: <ul style="list-style-type: none"> ○ Business performance of the organisation ○ Number of staff in stores ○ Staff’s skills ○ Staff wastage • Decide on the recruitment or deployment plan according to the human resources policies and earnings forecasts of the retail stores ◆ Review staff performance after deployment and the effect on the operation of the organisation <p>6.3 Exhibit professionalism</p>

	<ul style="list-style-type: none"> ◆ Ensure deployment of staff according to the principle of fairness and justice in order to avoid job mismatch ◆ Comply with ordinances related to equal opportunities and anti-discrimination ◆ Maintain communication with staff members or staff associations (e.g. staff unions)
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Master the organisational structure and the scope of work and duties of all ranks of the organisation; ◆ Make recommendations to the management level on staff deployment and implement them according to the current status and future business development as well as the manpower demand of the organisation, so as to bring out strengths of staff and facilitate the development of the organisation; and ◆ Monitor staff performance, provide guidance and training when necessary.
8. Remark	This UoC is adopted from 105133L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Set up goods classification
2. Code	111355L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for goods management in retail stores. Practitioners have the ability to classify goods in accordance with the organisation’s goods classification guidelines and procedures to align with the organisation’s retail business development.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of goods classification</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s established guidelines and procedures for goods classification ◆ Understand criteria of goods classification, e.g.: <ul style="list-style-type: none"> • By usage of goods • By raw materials of goods • By production method of goods • By ingredients of goods ◆ Understand the purpose of goods classification, e.g.: <ul style="list-style-type: none"> • Facilitate retail business management • Facilitate customers to understand characteristics of goods • Facilitate the organisation to analyse and review the sales of goods • Fulfil the legal requirements as stipulated by the government, e.g. customs declarations for import and export ◆ Master methods of goods classification, e.g.: <ul style="list-style-type: none"> • Line taxonomies (i.e. hierarchical classification) • Faceted classification (i.e. parallel classification) ◆ Understand the requirements of the government and governing bodies for goods classification, e.g.: <ul style="list-style-type: none"> • Goods classification for import and export customs declarations • Related government ordinances (e.g. Undesirable Medical Advertisements Ordinance (UMAO), registration of Chinese and Western medicine, Nutrition Labelling (7+1)) • International classification to use when applying for a registered outlook design from the Intellectual Property Department, etc. <p>6.2 Set up goods classification</p> <ul style="list-style-type: none"> ◆ Classify goods of the organisation in accordance with the following considerations/requirements, including: <ul style="list-style-type: none"> • The organisation’s established guidelines for goods classification • Characteristics of goods sold by the organisation • Requirements of the government and governing bodies • Cultural differences between different customers • Local and international freight contract provisions, etc. ◆ Implement goods classification, including: <ul style="list-style-type: none"> • Communicating with related staff and external parties • Searching for, obtaining and interpreting goods classification guidelines and information • Compiling a list of goods categories • Classifying goods and assigning codes after classification • Facilitating work related to goods classification by computer software • Filing or inputting information related to goods classification into computer systems, etc. ◆ Perform other work related to goods classification, including: <ul style="list-style-type: none"> • Seeking resources to support the set-up of goods classification • Understanding other organisations, including goods classification methods adopted by competitors • Organising activities related to goods classification, etc. ◆ Regularly submit goods classification progress reports to the higher level and give improvement suggestions

	<p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Set up goods classification and ensure that the method adopted for goods classification is easy to master and enables a convenient and fast location/tracking of goods
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Classify goods in accordance with the organisation's goods classification guidelines and procedures; and ◆ Ensure that the method adopted for goods classification is easy for users to master and can align with the organisation's retail business development.
8. Remark	This UoC is adopted from 105136L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Use the retail sales system
2. Code	111356L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for handling goods transactions in the retail industry. Practitioners have the ability to use the retail sales system to ensure smooth day-to-day operations of the sales and transactions of goods in the retail stores.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of retail sales system</p> <ul style="list-style-type: none"> ◆ Understand the goods transaction procedures of the organisation ◆ Possess knowledge of the retail sales system selected to use by the organisation, including: <ul style="list-style-type: none"> • Features, characteristics, structure and operation of the system • Operating procedures and skills • Special features • Points to note ◆ Understand the advantages of using retail sales system ◆ Know about the basics and skills of computation ◆ Understand customer relationship management and communication skills <p>6.2 Use the retail sales system</p> <ul style="list-style-type: none"> ◆ Implement procedures to prepare the operation of the retail sales system according to corporate guidelines, e.g.: <ul style="list-style-type: none"> • Enter the names and prices of goods • Activate the checking and verification procedures of the retail sales system • Clear transaction history • Verify the cash • Put on sufficient voucher, receipt or paper roll ◆ Use the retail sales system to handle day-to-day operations of the sales of goods and payment in the retail stores according to operating guidelines, e.g.: <ul style="list-style-type: none"> • Day-to-day store management <ul style="list-style-type: none"> ○ Input data of the goods ○ Sales and return of goods, refund, change of goods, cancellation of transaction, etc. ○ Payment methods (e.g. cash, credit card, gift certificate) ○ Reserve goods ○ Give free gifts • Inventory management <ul style="list-style-type: none"> ○ All stores inventory enquiry ○ Management of goods transfer between stores ○ Print out goods barcode labels • Membership management <ul style="list-style-type: none"> ○ Shopping bonus point scheme ○ Points redemption reward scheme ○ Discount offers • Product promotion <ul style="list-style-type: none"> ○ Coupon promotion ○ Promotion period / festive offers ◆ Use the retail terminal system to record and compile all kinds of reports after closing business everyday according to established procedures of the organisation, including sales report, goods return report, cash summary report, etc. <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Adhere to job ethics and follow the operating guidelines of the retail sales system to prevent tampering with records or theft

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Use the retail sales system to handle day-to-day sales operations of retail stores according to the organisation's code of practice and operating guidelines from the sales system supplier; and ◆ Guide and supervise staff to operate the retail sales system in accordance with the organisation's procedures and guidelines, provide guidance and training when necessary.
8. Remark	This UoC is adopted from 105138L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Implement commodity display
2. Code	111357L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for commodity display in the retail industry. Practitioners have the ability to display / show commodities properly in retail stores to attract and facilitate customers to buy.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of commodity display</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s product promotion and display/showing strategies ◆ Understand the purpose of showing products (e.g. increase customer flow, promote new commodities, stimulate purchasing desire to facilitate transactions, thematic promotion) ◆ Understand the methods, effects and techniques for various types of commodity display (e.g. focal style, scenic style promotion style) ◆ Understand factors to be considered in commodity display, including the image, environment and decoration of the store, characteristics, category and seasonality of commodities, etc. ◆ Understand the characteristics of competitor’s commodity display ◆ Know about the usage, characteristics and operating methods of various kinds of display equipment (e.g. display rack, electronic photo frame, exhibition platform, plastic display basket) ◆ Know about legal requirements related to occupational safety and health <p>6.2 Implement commodity display</p> <ul style="list-style-type: none"> ◆ Confirm with relevant departments details of plans for commodity display/showing, e.g.: <ul style="list-style-type: none"> ● Purpose of display, theme of design ● Installation requirements for lighting, power supply and audio equipment ● Type and nature of the commodities ● Estimates of expenditure ◆ Obtain store information for reference before displaying / showing the commodities, including: <ul style="list-style-type: none"> ● Floor plan, proportion of space ● Information on target groups of customers ● Decoration, shelves, lighting, display and furniture of the store ● Workspace information ◆ Implement commodity display according to the organisation’s overall sales and marketing strategy for commodities, including: <ul style="list-style-type: none"> ● Formulating display design plan ● Confirming the theme of display, e.g. commercialised, livelihood, personalised, etc. ● Confirming the appropriate display location and space ● Arranging and installing appropriate display equipment ● Ensuring the accuracy of commodity prices and labels ● Regularly arranging to place the promotional commodities on shelves ● Displaying promotional posters and pamphlets ◆ Check the display items regularly to ensure they are in good condition, and change them accordingly ◆ Review the effectiveness of commodity display and submit reports to the higher level <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Follow the Occupational Safety and Health Ordinance when implementing commodity display ◆ Commodity display can attract customers and stimulate customers’ desire to purchase so as to boost the sales of the retail store

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Use knowledge and techniques in commodity display to implement commodity display in accordance with the organisation's marketing and sales strategies in order to achieve the established purpose of display; ◆ Review regularly the effectiveness of the commodity display plan and check the condition of the display items; change the items if necessary; and ◆ Guide and supervise staff to implement commodity display tasks in accordance with the organisation's guidelines, provide guidance and training when necessary.
8. Remark	This UoC is adopted from 105140L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Manage and maintain workplace
2. Code	111358L4
3. Range	This unit of competency (UoC) is applicable to store management staff in the retail industry. Practitioners have the ability to perform supervisory and management duties, and to implement workplace management and maintenance work according to the business strategies, policies, management codes and/or operations manual of the organisation so as to ensure smooth operation of its retail business.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of workplace management and maintenance</p> <ul style="list-style-type: none"> ◆ Understand the business strategies and workplace management code of the organisation ◆ Understand the importance of workplace management and maintenance on the development of retail business, including: <ul style="list-style-type: none"> • Impression on customers / potential customers • Perception and confidence of customers on the goods/services of the organisation • Self-confidence of staff and their sense of belonging to the organisation ◆ Master the organisation’s resources for workplace management and maintenance, including: <ul style="list-style-type: none"> • Financial resources • Manpower resources • Services provided by contractors (e.g. workplace maintenance and repair) • Support from the management ◆ Understand the legislations and guidelines of the Government and governing bodies related to the control of retailing workplace (e.g. measures for occupational safety) <p>6.2 Manage and maintain workplace</p> <ul style="list-style-type: none"> ◆ Manage all the workplaces for retail business according to the business strategies and codes of the organisation, including: <ul style="list-style-type: none"> • Maintaining a safe and tidy working environment • Performing scheduled management and maintenance work in an orderly way (e.g. cleaning the workplace), so as to avoid causing inconvenience to customers • Acting flexibly when handling and clearing the goods at the workplace and according to the nature of the goods and trade practice • Keeping the workplace clean, including: <ul style="list-style-type: none"> ○ Managing and monitoring the personal hygiene of staff ○ Cleaning the workplace according to schedule (e.g. vacuuming, cleaning and conducting pest control) ○ Placing “slippery” signs in advance before removing or handling objects so as to alert all the people. The best way is to assign a staff member to alert customers to the danger ○ Timely removing or handling wastes or garbage such as stagnant water on the floor, food remains and sewage so as to prevent accidents ○ Liaising with related parties (e.g. the contractor or cleaning company serving the arcade) for keeping the workplace clean • Carrying out other measures related to workplace management and maintenance, including: <ul style="list-style-type: none"> ○ Erecting warning signs to alert customers and staff to potential danger at the workplace ○ Maintaining mechanical devices or consumables ○ Using and cleaning tools and machines according to supplier guidelines and safety regulations, and putting them back after use ◆ Maintain communication with all levels of staff for enhancement of workplace management and maintenance ◆ Report other related work to the higher level regularly, and propose improvements <p>6.3 Exhibit professionalism</p>

	<ul style="list-style-type: none"> ◆ Follow all the legislations and regulatory codes of the Government when performing the duties of workplace management and maintenance ◆ Work on the details and proactively identify opportunities for improvement
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Perform the duties of workplace management and maintenance according to the business strategies and management codes of the organisation; and ◆ Manage and maintain the workplace and equipment so as to ensure smooth operation of the organisation's retail business.
8. Remark	This UoC is adopted from 105141L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Manage the termination of franchise
2. Code	111359L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for franchise management in the retail industry. Practitioners have the ability to perform supervisory duties, and to analyse and assess the impact of termination of franchise on the organisation’s operation and terminate the rights according to schedule so as to reduce the impact on daily operation.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of management of franchise and store operation</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s policy related to franchise, including: <ul style="list-style-type: none"> • Contract terms • Responsibilities of both parties in relation to the operation and termination of franchise • Franchise duration • Liability ◆ Understand the organisation’s procedures and formalities for termination of franchise, e.g.: <ul style="list-style-type: none"> • Handling assets • Transfer of intellectual property ◆ Know about legal requirements and professional codes related to franchise <p>6.2 Manage the termination of franchise</p> <ul style="list-style-type: none"> ◆ Formulate comprehensive procedures for termination of franchise according to the organisation’s franchise policy, including: <ul style="list-style-type: none"> • Schedule for closure • Rights and responsibilities of both parties • Handling assets and goods ◆ Assess the potential implications of termination of franchise, e.g.: <ul style="list-style-type: none"> • Disruption of business operation • Control of goods and stock volume • Allocation of shelf space • Staff redundancy ◆ Enforce the termination of franchise according to the procedures and schedule, including: <ul style="list-style-type: none"> • Handling remaining goods • Launching reduction sale • Informing customers of new arrangements • Maintaining the relationship with suppliers ◆ Coordinate and monitor the procedures for termination of franchise, and make proper adjustments if necessary ◆ Record the whole process and report to the higher level <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure the compliance with relevant professional codes and legislations in the process of termination of franchise ◆ Work on the details and proactively identify opportunities for improvement
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Formulate the schedule and procedures for closure of franchise which comply with contract terms according to the franchise policy of the organisation; and ◆ Coordinate and monitor the process of termination of franchise in order not to affect the daily business operation of retail stores.
8. Remark	This UoC is adopted from 105145L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Manage the retail team
2. Code	111360L4
3. Range	This unit of competency (UoC) is applicable to store management staff in the retail industry. Practitioners have the ability to manage the retail team and related resources of the store according to the sales strategies and market goals of the organisation so as to enhance sales performance.
4. Level	4
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of retail team management</p> <ul style="list-style-type: none"> ◆ Understand the sales strategies and market goals of the organisation, including: <ul style="list-style-type: none"> • The overall sales target of the organisation and that of the branches (if any) • The status or positioning of store products in the retail market • The competitive advantages of store products ◆ Understand customers’ needs for goods and the trend of the whole market ◆ Master the range, grades and quality of goods and services supplied by the store ◆ Understand the new products and services provided by the store ◆ Master the resources allocated to support the retail team, e.g. manpower and material resources ◆ Master the methods and techniques of managing the retail team and resources of the store, including: <ul style="list-style-type: none"> • Interpersonal skills • Techniques of developing positive thinking, attitude and behaviour • Ability for team building • Leadership • Training and supervision of team members • Arrangements for making decisions and delegation • Techniques for analysing and following up sales reports <p>6.2 Manage the retail team</p> <ul style="list-style-type: none"> ◆ Lead the retail team of a store, including: <ul style="list-style-type: none"> • Knowing about the skills, needs, specialties and weaknesses of individual salespersons • Issuing clear instructions to team members • Building up communication channels that the organisation can control autonomously ◆ Manage the work of the retail team, e.g.: <ul style="list-style-type: none"> • Informing members of the sales target and the criteria for evaluation of performance • Holding meetings for the retail team regularly so as to master and review the latest sales performance • Drawing up the details of the sales report with the team, including the performance indicator, format, and deadline • Analysing and following up the sales report submitted by the team ◆ Manage related resources, including: <ul style="list-style-type: none"> • Allocating resources to retail team members according to operational needs • Urging and motivating retail team members to achieve the overall and individual sales targets • Handling the request for resources or support from the team as soon as possible • Monitoring the expenditure of the retail team and ensure that it lies within the budget ◆ Develop team members with positive values and job ethics, including carrying out sales-related activities wholeheartedly and reporting sales data honestly ◆ Regularly report to the management the operation of the store retail team and related resources, and propose improvements <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Be fair and just to all members and develop the team spirit when managing the retail team ◆ Comply with the Equal Opportunity Ordinance and the Anti-discrimination Ordinance ◆ Maintain communication with staff or staff associations (e.g. trade unions)

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Manage the retail team and related resources according to the sales strategies and market goals of the organisation and boost sales performance; and ◆ Develop team members with positive values and job ethics and respond to the development of the organisation's retail business.
8. Remark	This UoC is adopted from 105146L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Inspect the product loss prevention measures
2. Code	111361L4
3. Range	This unit of competency (UoC) is applicable to store management staff in the retail industry. Practitioners have the ability to perform inspection to prevent product loss according to related policy and procedures of the organisation so as to safeguard its benefits and improve the product management procedures / system at the store.
4. Level	4
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of product loss prevention</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s established policy and procedures for product loss prevention ◆ Understand that the policy and procedures for product loss prevention is important to corporate operation and inspection is more important to product loss prevention ◆ Understand different inspection methods and their advantages and disadvantages ◆ Master the purposes of inspecting the product loss prevention measures <ul style="list-style-type: none"> • Identify potential loopholes • Look for the causes of product loss • Review and monitor the effectiveness of the product loss prevention measures • Assess whether the related insurance policy meets the needs ◆ Master the scope for inspecting the product loss prevention measures, including: <ul style="list-style-type: none"> • Operating procedures of different aspects of the retail store • Loopholes in the security system of the retail store • Methods of handling product loss ◆ Master the resources required for inspecting the product loss prevention measures, including: <ul style="list-style-type: none"> • Delegation from the higher level • Manpower and financial resources • Relevant equipment (e.g. computer, alarm system) • Inspection forms and reports <p>6.2 Inspect the product loss prevention measures</p> <ul style="list-style-type: none"> ◆ Inspect the organisation’s established product loss prevention policy and measures, including: <ul style="list-style-type: none"> • Process for the delivery of goods • Process for the return of goods • Bill payment process • Process for handling and managing cash • Time for inventory management • Alarm and security system • Inspecting past cases of goods loss and assessing the impact, e.g. on insurance policy and business operation ◆ Prepare and submit inspection reports on lost goods ◆ Submit improvement proposals to the higher level according to the results of inspecting the product loss prevention measures, e.g.: <ul style="list-style-type: none"> • Providing staff with the training related to product loss prevention • Purchasing security equipment for product loss prevention <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Inspect the product loss prevention measures and avoid the occurrence of concealment, fraud and corruption. ◆ Work on the details and proactively identify opportunities for improvement
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Perform inspection according to the organisation’s established policy and procedures for product loss prevention; and ◆ Ensure that inspecting relevant measures can prevent goods loss and improve goods management at the retail store.
8. Remark	This UoC is adopted from 105148L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Manage the financial resources of the retail store
2. Code	111362L4
3. Range	This unit of competency (UoC) is applicable to staff engaged in financial management of the store in the retail industry. Practitioners have the ability to manage matters related to the financial resources of the store properly, including control of cost and expenditure, preparation of store sales budget and management of store accounting system, so as to control and manage the financial resources effectively.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of financial management of the retail store</p> <ul style="list-style-type: none"> ◆ Understand management of the financial resources of the store and its importance to the overall financial control and management of the organisation ◆ Understand the existing policy and related details of the financial resources management of the retail store <ul style="list-style-type: none"> • Operation policy and procedures of the retail store • Allocation of the financial resources of the retail store • Inventory management system adopted by the store • The system adopted by the store for recording sales, revenue and expenditure • The system adopted by the store for recording financial items, personnel matters and payroll ◆ Understand the practice and methods for management of financial resources <p>6.2 Manage the financial resources of the retail store</p> <ul style="list-style-type: none"> ◆ Control cost and budget, e.g.: <ul style="list-style-type: none"> • Carry out cost control measures according to store operation policy • Analyse the information and data of cost and resources allocation • Assist departments in the control of the cost of their respective areas • Monitor the data related to revenue, expenditure, stock volume, store profits and ensure that all the expenditure lies within the budget • Report to the higher level the management of the financial resources of the store regularly and submitting the financial report of the store ◆ Monitor store sales performance, e.g.: <ul style="list-style-type: none"> • Approach relevant departments / stores regularly to understand the sales performance of goods and control related financial resources • Regularly prepare store sales budget for the future to cope with the utilisation of related resources • Analyse the financial feasibility report of opening a new store ◆ Manage the accounting system of the store <ul style="list-style-type: none"> • Operate the inventory management system of the store according to established policy and procedures of the organisation • Monitor the store system used for recording sales figure, revenue and expenditure • Monitor the store system used for recording financial items, personnel matters and payroll <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the sales budget of the retail store does not deviate from the goal of the financial policy established by the organisation; and ◆ Manage the financial resources of the store according to professional ethics
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Control the operation cost of the retail store to cope with the sales budget and manage the financial resources effectively.
8. Remark	This UoC is adopted from 105149L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Manage retail store inventory
2. Code	111363L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for commodity management in the retail industry. Practitioners have the ability to implement retail store inventory management according to the organisation’s established retail inventory management policies in order to satisfy customer demand and reduce waste.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of inventory management</p> <ul style="list-style-type: none"> ◆ Master the organisation’s inventory management policies, e.g.: <ul style="list-style-type: none"> • Maximum and minimum quantity of inventory required for different categories of products • Inventory target of the store ◆ Understand the organisation’s inventory control system, including: <ul style="list-style-type: none"> • Guidelines/procedures for handling insufficient or surplus stock • Manual or electronic inventory tracking system • Inventory requirements for low-flow commodities • Stocktaking system • Inventory quantity control policy ◆ Understand factors affecting the inventory level of different stores, including: <ul style="list-style-type: none"> • Buying pattern and needs of the target groups of customers • Ordering strategies and accuracy • Seasonal cycle • Environmental factor • Sales strategies • Stock supply arrangement ◆ Understand noting points for handling and storing goods, including: <ul style="list-style-type: none"> • Nature of goods, e.g. requirements for freezing, isolated storage, room temperature, etc. • Expiry dates of goods • Inventory cycle • Commodities’ labels • Code of practice of the trade <p>6.2 Manage retail store inventory</p> <ul style="list-style-type: none"> ◆ Analyse factors affecting the store’s stock demand and ordering demand, including: <ul style="list-style-type: none"> • Whether the future supply is stable or not • Sales volume • Seasonal reason • Marketing activities and brand promotions • Market trend and technical change • Franchise commitment • Financial budget • Past sales performance • Space of warehouse ◆ Forecast the quantity of the inventory required of different retail stores according to the organisation’s retail inventory policy and the sales promotion plans of relevant departments; implement retail inventory management according to the pre-set inventory level and replenishment schedule ◆ Monitor the procedures for the delivery of inventories of the store to ensure sufficient stock ◆ Regularly review the effectiveness and timeliness of the existing ordering and inventory control procedures, and make improvement accordingly to ensure sufficient stock of the store ◆ Immediately stop ordering products to be pulled off the shelves or discontinued products according to corporate guidelines, and handle the remaining inventories according to guidelines, e.g. return to the warehouse or supplier, reduction sale, pull the products off the shelves and destroy ◆ Take timely actions to follow up and report to the higher level according to corporate

	<p>guidelines when finding that the inventory of product exceeds the inventory target/indicator</p> <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the quantity of inventory of the store can satisfy customer demand and prevent unnecessary waste ◆ Work on the details and proactively identify opportunities for improvement
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Analyse comprehensively factors affecting the store's inventory level and implement retail store inventory management; and ◆ Regularly review the inventory level of the retail store and make adjustment accordingly to ensure an appropriate inventory level and compliance with the organisation's inventory management policies.
8. Remark	This UoC is adopted from 105151L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Mange store displays
2. Code	111364L4
3. Range	This unit of competency (UoC) is applicable to store management staff in the retail industry. Practitioners have the ability to manage store displays according to the design plan and goal so as to cope with the marketing strategies of the organisation and facilitate its retail business development and boost sales.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of retail store displays</p> <ul style="list-style-type: none"> ◆ Understand the marketing strategies of the organisation ◆ Understand the items involved in store displays, including internal decoration, windows, entrance and exit, outer appearance of the store, sign boards, product display ◆ Understand the main purpose of the design for store displays, including: <ul style="list-style-type: none"> • Creating the image of the retail store • Increasing the chance of promoting products for the organisation • Planning the use of the internal space of the store and maximising its effectiveness ◆ Understand the major procedures and factors of the design for store displays, including: <ul style="list-style-type: none"> • Confirming the floor plan • Determining the design theme • Confirming the criteria for the display of products • Utilising the space • How to use the lighting in a creative way • Designing and arranging displayed props and equipment • Customer needs and market trend • Past sales volume of displayed products and expected sales growth ◆ Understand the techniques involved in store displays/exhibition designs <p>6.2 Mange store displays</p> <ul style="list-style-type: none"> ◆ Confirm the requirements and design of store displays according to the marketing strategies of the organisation, including: <ul style="list-style-type: none"> • Information of the promotional activity related to products <ul style="list-style-type: none"> ○ Types and characteristics of products ○ Product promotion techniques, e.g. demonstration, window display / promotion poster / display cabinet / food or drink tasting ○ Promotional period and offers ○ Seasonal / festival factor • Requirements for space arrangement • Display methods and display areas, e.g. shelves and exhibition zones ◆ Carry out the procedures and plan of store displays, e.g.: <ul style="list-style-type: none"> • Coordinate different designs of displays • Communicate with product suppliers and contractors • Organise the installation of displayed props, furniture and equipment • Arrange sufficient stock and shelves to cope with the promotional activity • Assign dedicated staff or appropriate personnel to cope with the promotional activity, e.g. introduction of the uses, features and operation methods of products and the benefits to customers ◆ Coordinate with relevant departments or contractors so as to ensure that the display of products is carried out according to scheduled plan ◆ Check the displays, relevant equipment and props regularly and ensure that they are kept in good and safe conditions; perform maintenance or replacements if necessary ◆ Negotiate with suppliers at the end of the promotional activity and ensure that relevant displayed equipment, props and remaining products are properly and timely handled, e.g. returning them to suppliers or carrying out reduction sales according to the guidelines of the organisation ◆ Review and assess the effects of store displays regularly, and keep records and save files for reference by future promotion <p>6.3 Exhibit professionalism</p>

	<ul style="list-style-type: none"> ◆ Manage store displays according to the Occupational Safety and Health Ordinance ◆ The design of store displays can help achieve marketing goals and facilitate the growth of the retail business of the organisation
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Manage store displays according to the design plan and requirements of the organisation so as to achieve the goals and effects of the promotional activity; and ◆ Review the effects of the plan of store displays and keep records and save files for future reference.
8. Remark	This UoC is adopted from 105152L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Manage the subordinate’s work performance
2. Code	111365L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for staff management in the retail industry. Practitioners have the ability to use performance management skills to manage and monitor the subordinate’s work performance so as to meet the established performance standards and achieve effective human resources management.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of staff management</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s human resources policies ◆ Understand the staff performance appraisal procedures and standards of the organisation, e.g.: <ul style="list-style-type: none"> • Collect performance data (e.g. sales amount) • Feedback from the higher level or staff • Evaluate past performance • Set the performance target mutually agreed • Appraise staff training results ◆ Understand staff performance target established by the organisation, including personal and team targets ◆ Know about personnel management skills, including: <ul style="list-style-type: none"> • Team cooperation • Staff reward • Communication skills • In-service training, counselling and coaching ◆ Understand ordinances and codes of practice related to employment relationship <p>6.2 Manage the subordinate’s work performance</p> <ul style="list-style-type: none"> ◆ Communicate with the subordinate to jointly determine individual concrete, measurable and achievable work targets and performance indicators according to the established performance standards of the organisation ◆ Regularly monitor and review the subordinate’s overall work performance ◆ Regularly provide the subordinate with comments on his/her work performance and point out areas that need to be improved ◆ Conduct an appraisal with the subordinate in a fair and objective manner according to the corporate policy and procedures for staff performance appraisal ◆ Complete an objective work performance appraisal report according to the established personnel management policies; file it and give a copy to the staff member <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Treat the subordinate’s work performance fairly and objectively ◆ Comply with the Equal Opportunities Ordinance and the Anti-discrimination Ordinance ◆ Maintain communication with staff or staff associations (e.g. trade union)
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Use communication skills to work out concrete and achievable performance targets with the subordinate according to the established performance standards of the organisation; and ◆ Monitor and evaluate the subordinate’s work performance and regularly provide the subordinate with comments on his/her work performance and point out areas that need to be improved so as to achieve effective human resources management.
8. Remark	This UoC is adopted from 105153L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Develop risk management strategies
2. Code	111366L5
3. Range	This unit of competency (UoC) is applicable to staff of the management level in the retail industry. Practitioners have the ability to develop, according to the organisation’s business goals and strategies, a set of relevant risk management strategies for staff to follow and implement in order to protect the interests of the organisation.
4. Level	5
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of risk management</p> <ul style="list-style-type: none"> ◆ Understand the importance of planning and formulating risk management strategies ◆ Understand the risk level of different aspects that the risk management strategies need to cover, and adopt different risk assessment / measurement methods ◆ Understand the great importance of planning and implementation of risk management strategies to retaining existing customers and exploring new source of customers ◆ Understand the great importance of maintaining communication with external bodies (e.g. contractors) in the planning process of risk management strategies ◆ Understand risk management model <ul style="list-style-type: none"> ● Different risk management tools and measurement methods, and master their advantages and disadvantages ● Handling method and communication mechanism during the crisis ● Pre-crisis risk control assessment and post-crisis risk management measures <p>6.2 Develop risk management strategies</p> <ul style="list-style-type: none"> ◆ Master the characteristics of retail business, distinguish major risks faced by the organisation’s retail business, including risks caused by service contractors ◆ Apply risk management knowledge and assess the factors affecting business development to establish risk management strategies for the organisation by considering factors such as: <ul style="list-style-type: none"> ● Retail product categories ● Customer groups ● Geographical location of the store ● Relevant strategies of competitors ● Service level of suppliers and contractors, etc. ◆ Ensure the development of the risk management strategies is in balance with the organisation’s bearable risk level and targets of customer relationship management ◆ Classify the risks and set a maximum risk limit for the organisation’s retail activities, and formulate measures to ensure that the risk level is controllable ◆ Discuss with various departments to develop objectives of risk management strategies, and formulate appropriate plan and monitoring measures to ensure smooth implementation of risk management strategies ◆ Ensure that the risk management strategies and other measures (e.g. marketing plan) formulated by the organisation do not violate government ordinances ◆ Discuss with the insurance intermediary or insurance company to formulate an appropriate risk transfer plan ◆ Regularly report to the higher level the status of the implementation of risk management strategies and submit improvement proposals <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Take into account both the interests of the organisation and different groups of customers when developing risk management strategies ◆ Handle various types of risks with prudence

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Master the operation of the organisation's retail business and evaluate the impact of various risks on its business operation; and ◆ Develop a set of risk management strategies according to the organisation's business goals and strategies.
8. Remark	This UoC is adopted from 105154L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Draw up store and window design plans
2. Code	111367L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for store and window design plans or related marketing activities in the retail industry. Practitioners have the ability to use a wide range of product knowledge and marketing techniques to draw up the most appropriate window design plan to help the development of retail business.
4. Level	5
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of store and window design</p> <ul style="list-style-type: none"> ◆ Understand the retail market trend and the latest information of trendy products ◆ Understand the business strategies and marketing plan of the organisation ◆ Understand the characteristics of the products of the organisation, including: <ul style="list-style-type: none"> • Market position of the brand • Nature of products, e.g. size, weight and materials used • Value of the products • Special requirements of products, e.g. insurance policy ◆ Understand the ways to promote and display similar products of competitors ◆ Understand different types of customers and their preferred products of the organisation ◆ Master the manpower and financial resources required for the formulation of store and window design plans ◆ Understand the requirements and regulations of the Government and governing bodies regarding product promotion, including those related to store and window display <p>6.2 Draw up store and window design plans</p> <ul style="list-style-type: none"> ◆ Analyse a range of factors when drawing up store and window design plans, including: <ul style="list-style-type: none"> • The trendiest and the most popular product / service in the retail market at the time • Assessing the interrelationship between the design plan and the turnover • Assessing the fees paid by product suppliers (e.g. “slotting fee”) • The best display period for showing the product • The time and cost required for the replacement and change of the displayed product • Safety measures (e.g. wiring, lighting and arrangements) ◆ Draft and formulate store and window design plans for the organisation, including: <ul style="list-style-type: none"> • Formulating store and window design plans for the organisation according to the business strategies, target markets and the needs of customer groups • Choosing the series of products to be displayed in the store and windows according to the promotional strategies of the organisation, and showing the effect of visual beauty • Allocating the resources and manpower required for the design work of store and window display • The display of products in the store and windows has to meet the needs of target customer groups and follow the promotional strategies of the organisation, e.g. seasonal or thematic promotions ◆ Gather sufficient manpower, including internal staff and contractors, to carry out the design plan ◆ Review and decide the new prices of the products displayed in the store and windows ◆ Collect the feedback of customers on the displayed products in the store and windows and the information of sales performance through effective channels, including: <ul style="list-style-type: none"> • Site observation/interview • Reports submitted by the third party (e.g. contractors) • Information collected from customer enquiries ◆ Assess the implications of charging product suppliers e.g. “slotting fee” ◆ Submit improvement proposals to the higher level after data analysis <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the store and window design plan comply with relevant legal requirements, e.g. Fire Services Ordinance and Occupational Safety and Health Ordinance

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Use product-related knowledge and marketing techniques to draw up the most appropriate window design plan for the store of the organisation; and ◆ Use different channels to collect the feedback of customers on the design and submit optimisation proposals to the higher level after compiling relevant information.
8. Remark	This UoC is adopted from 105155L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Establish the retail sales system
2. Code	111368L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for store operation management in the retail industry. Practitioners have the ability to establish appropriate retail sales and operations strategies, goals, manuals, systems and procedures for operating smart retail platforms to enable smooth operations, taking into account factors like the store’s scale, product range and technology.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of the retail sales system and store operation</p> <ul style="list-style-type: none"> ◆ Understand the business operation and business model of the retail store ◆ Understand the features, characteristics and structure of the retail sales system ◆ Know about the good practice related to retail store operation and retail sales system operation ◆ Understand customer service techniques ◆ Understand store security procedures of the organisation <p>6.2 Establish the retail sales system</p> <ul style="list-style-type: none"> ◆ Analyse and assess the required retail sales system features according to the daily operating procedures of the retail store, including: <ul style="list-style-type: none"> • Cashier mode • Cash flow management • Goods management • Inventory management • Membership management ◆ Establish appropriate daily operating procedures of the retail sales system and smart retail platform, including: <ul style="list-style-type: none"> • Preparation before opening hours <ul style="list-style-type: none"> ○ Logging in to the system ○ Preparing cash flow records before opening hours • During opening hours <ul style="list-style-type: none"> ○ Cash flow calculations (e.g. on immediate basis or daily basis) ○ Verifying credit card slips ○ Trace of goods ○ Purchase offers ○ Handling membership transactions (e.g. discount offers, redemption rewards and bonus point records) • After opening hours <ul style="list-style-type: none"> ○ Logging out of the system ○ Preparing daily reports (e.g. of cash, cancellation of transactions and sales) ◆ Formulate the operating procedures and requirements for the security of the retail sales system, including: <ul style="list-style-type: none"> • Setting user authority and user identification code <ul style="list-style-type: none"> ○ Refund, price change and cancellation of transactions ○ Counting cash, and inspecting and accepting cash ○ Preparing daily reports • Security procedures for logging in / out ◆ Formulate emergency procedures and measures for unexpected incidents, including: <ul style="list-style-type: none"> • Retail sales system failure • Paper jam • Power failure ◆ Use effective channels to make related staff clearly understand the operating procedures of the retail sales system and operate the system skilfully ◆ Design various forms for the retail sales system (e.g. statistical tables for recording cash / credit card transactions and daily sales reports) ◆ Review the effectiveness of the operating procedures of the retail sales system regularly and make adjustments if necessary

	6.3 Exhibit professionalism <ul style="list-style-type: none"> ◆ Ensure that the operating procedures of the retail sales system meet the operational needs of the retail business of the organisation
7. Assessment Criteria	The integrated outcome requirements of this UoC are the abilities to: <ul style="list-style-type: none"> ◆ Identify the required features of the retail sales system according to the operational needs of the retail store business and formulate appropriate operating procedures of the retail sales system and smart retail platform so as to ensure smooth operation of the store; and ◆ Design appropriate forms, report formats and statistical tables for recording cash/credit card transactions for the retail sales system of the organisation.
8. Remark	This UoC is adopted from 105157L5. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Store Operations’

1. Title	Formulate a retail store risk management plan
2. Code	111369L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for store business management in the retail industry. Practitioners have the ability to critically analyse and assess potential risks for store operation, formulate a comprehensive retail store risk management plan to control or reduce the influence on the organisation and relevant parties (e.g. staff, customers and suppliers).
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of retail store risk management</p> <ul style="list-style-type: none"> ◆ Master the organisation’s business goals and risk management policies ◆ Understand the business and mode of operation of retail store (e.g. suppliers, business partners) ◆ Understand the concept of risk management, including: <ul style="list-style-type: none"> • Definition and classification of risk • Efficiency and objectives of risk management • Risk management procedures (identify, forecast and handle risks) • Handling of risks (transfer, avoid and prevent loss) ◆ Understand potential risks related to retail store operation and sources of risks, e.g.: <ul style="list-style-type: none"> • Change in economic environment • Fires, floods, natural disasters • Terms of rental agreement for shop / showroom • Customer’s expectation, product safety • Information security • Corporate reputation and brand image ◆ Understand legal requirements and regulations related to store operation, e.g.: <ul style="list-style-type: none"> • Buildings safety • Occupational safety and health • Consumer goods safety ◆ Understand the international standards and coverage of risk management <p>6.2 Formulate a retail store risk management plan</p> <ul style="list-style-type: none"> ◆ Formulate a risk management plan to deal with the potential risks in different areas of a retail store <ul style="list-style-type: none"> • Change in market demand and product development trend • Economic growth or decline • Change in legislation • Product quality and customer complaints • Intellectual property • Safety and security, etc. ◆ Analyse the risks existing in retail stores of the organisation according to trade practice and international standards, and classify them in different levels according to the degree of damage, e.g. high, middle and low levels ◆ Use risk management skills to formulate control methods and risk management procedures for risks of different levels, e.g. buying insurance, contract terms protection, etc. ◆ Formulate a risk management monitoring system to review and assess the effectiveness and timeliness of the risk management mechanism, and make amendments accordingly <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the retail store risk management plan of the organisation monitors the risks effectively in order to minimise the impact on store operation ◆ Handle various types of risks with prudence

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Identify potential risks of retail store, use risk management skills to classify risk types and degree of damage, and formulate an appropriate risk management plan to minimise the impact and degree of damage on store operation; and ◆ Formulate risk monitoring and assessment mechanism to monitor the effectiveness and timeliness of the risk management plan, and activate remedial procedures.
8. Remark	This UoC is adopted from 105160L5.

**Units of Competency for
'Human Resource Management & Development'**

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Human Resource Management & Development’

1. Title	Comply with anti-bribery law and adopt a high standard of integrity in performing retail functions
2. Code	111370L1
3. Range	This unit of competency (UoC) is applicable to all levels of staff working in any functional areas of the retail industry. Practitioners have the ability to understand the importance of compliance with the law, key provisions of the anti-bribery law in Hong Kong as well as ethical and integrity requirements; aware of the related challenges that may arise in the work environment in the industry, and gain the knowledge of how to deal with them; and develop a high standard of integrity, and an ethical as well as law-compliant culture.
4. Level	1
5. Credits	1 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of the anti-bribery law in Hong Kong, ethical and integrity requirements, and the related challenges</p> <ul style="list-style-type: none"> ♦ Understand the importance of complying with the law and business ethics to the proper functioning and well-being of individuals, businesses, and society ♦ Understand the key provisions of the Prevention of Bribery Ordinance (Cap. 201) ♦ Understand the values, requirements and expectations of business ethics, including fairness, justice, impartiality, integrity, fiduciary duty, trust and loyalty, confidentiality, and avoidance, declaration and management of conflict of interest, etc. ♦ Understand the importance of complying with the company’s code of conduct and house rules <p>6.2 Comply with anti-bribery law and adopt a high standard of integrity in performing retail functions</p> <ul style="list-style-type: none"> ♦ Develop a law-compliant and ethical culture, and a high standard of personal integrity ♦ Ensure that one’s performance of duty and personal behaviour comply with the Prevention of Bribery Ordinance and related laws ♦ Ensure that one’s performance of duty and personal behaviour comply with business ethics principles, integrity requirements, and the company’s code of conduct and house rules ♦ Undertake duties to safeguard the company’s funds, assets and information ♦ Avoid misusing official position in the company to pursue private interests ♦ Report breaches of the company’s code and house rules, misconduct, corruption and criminal offences encountered/discovered in the course of performing one’s duties <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ♦ Possess and exhibit a standard of personal integrity as well as law-compliant and ethical culture in performing one’s duties; and ♦ Be aware of the corruption / integrity challenges that may arise in the work environment of the retail industry, and be able to deal with them
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ♦ Have developed a law-abiding awareness, gained a practical understanding of the anti-bribery law and common corruption challenges at work; and ♦ Have gained a good understanding of the expected standard of integrity and common ethical challenges at work, and being capable to deal with them.
8. Remark	This UoC is adopted from 106886L1.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Human Resource Management & Development’

1. Title	Record and verify staff attendance information
2. Code	111371L2
3. Range	This unit of competency (UoC) is applicable to human resources management staff in the retail industry. Practitioners have the ability to record, verify and handle staff attendance information according to the Minimum Wage Ordinance.
4. Level	2
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of staff attendance record</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s policy and procedures for staff attendance arrangement ◆ Understand ordinances relevant to the handling and keeping of staff records; including: <ul style="list-style-type: none"> • Employment Ordinance • Mandatory Provident Fund Schemes Ordinance • Minimum Wage Ordinance • Personal Data (Privacy) Ordinance ◆ Understand what staff information and attendance record to keep, such as: <ul style="list-style-type: none"> • Personal information • Training records • Records of sick leave and medical claims • Body check records • Hours / Days of work • Shifts and overtime records • Written records of disciplinary procedures (e.g. lateness, early leave, absenteeism) • Staff appraisal report ◆ Understand the importance of keeping staff information, including the attendance record ◆ Understand the legal liabilities for failing to keep and handle staff information according to relevant legal requirements <p>6.2 Record and verify staff attendance information</p> <ul style="list-style-type: none"> ◆ Handle staff attendance records during personnel management routines according to corporate and legal requirements, including: <ul style="list-style-type: none"> • Shifts attended within the recording period (morning, afternoon or night shift) • Number of hours or days attended within the recording period • Accrued salary payment within the recording period • Overtime or insufficient working hours • Workplace / shop, etc. ◆ Verify content of the staff attendance record, including whether or not: <ul style="list-style-type: none"> • It is signed and confirmed by the employee • It is verified and endorse by management • Its attendance data and salary calculation are correct ◆ When a problem is found in the staff attendance record, follow it up according to established procedures, including: <ul style="list-style-type: none"> • Clarifying with the employee / management concerned • Re-calculating and correcting the record • Reporting to the higher level ◆ Maintain all the staff attendance records for future reference <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the staff attendance records and related information comply with the Minimum Wage Ordinance

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Record, verify and handle staff attendance information according to corporate and legal requirements; and ◆ Maintain all staff attendance records according to the provisions of the organisation and relevant legal requirements for future reference.
8. Remark	This UoC is adopted from 105000L2.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Human Resource Management & Development’

1. Title	Handle staff records
2. Code	111372L2
3. Range	This unit of competency (UoC) is applicable to personnel management staff in the retail industry. Practitioners have the ability to handle staff records according to established procedures of the organisation and relevant legal requirements in order to protect the benefit of both the employers and employees.
4. Level	2
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of handling staff records</p> <ul style="list-style-type: none"> ◆ Understand ordinances relevant to the handling and keeping of staff records <ul style="list-style-type: none"> • Employment Ordinance • Mandatory Provident Fund Schemes Ordinance • Inland Revenue Ordinance • Personal Data (Privacy) Ordinance ◆ Understand types of employment records that should be kept, such as: <ul style="list-style-type: none"> • Personal information • Employment record • Training record • Records of body check, sick leave and medical claims • Written record of disciplinary procedures • Staff appraisal report ◆ Understand the importance of keeping employment records ◆ Understand the legal liabilities for failing to keep and handle staff records according to relevant legal requirements <p>6.2 Handle staff records</p> <ul style="list-style-type: none"> ◆ Handle and keep the records of existing and ex-staff during personnel management routines according to relevant legal requirements, such as: <ul style="list-style-type: none"> • Records to be provided/kept as required by Employment Ordinance <ul style="list-style-type: none"> ○ Personal information ○ Employment records ○ Statutory period of keeping the records • Records to be provided / kept as required by Mandatory Provident Fund Schemes Ordinance <ul style="list-style-type: none"> ○ Staff records ○ Monthly contribution statement • Records to be provided/kept as required by Inland Revenue Ordinance <ul style="list-style-type: none"> ○ Personal information ○ Employment record ○ Position employed ○ Amount of salary paid by cash ○ MPF contributions by the employee and the employer • Records to be provided/kept as required by Personal Data (Privacy) Ordinance <ul style="list-style-type: none"> ○ Principles of data protection ○ Use, disclosure and transfer of data ○ Security and deletion of data ○ Declaration for collecting personal information <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Follow the Code of Practice on Human Resource Management in Personal Data (Privacy) Ordinance

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Understand ordinances relevant to the handling of staff records; and ◆ Handle staff records during personnel management routines to protect the benefit of both the employers and employees.
8 Remark	This UoC is adopted from 105001L2.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Human Resource Management & Development’

1. Title	Apply general labour regulations
2. Code	111373L2
3. Range	This unit of competency (UoC) is applicable to staff in the retail industry. Practitioners have the ability to understand and observe the general requirements of labour regulations in daily operations in order to protect the mutual benefits of the employer and employees and avoid disputes.
4. Level	2
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of general labour regulations</p> <ul style="list-style-type: none"> ◆ Understand the functions and operation of the Labour Department and relevant statutory bodies, such as: <ul style="list-style-type: none"> • Organisation background • The meaning and importance of labour regulations of Hong Kong to employees and employers • Employment Ordinance • Mandatory Provident Fund Schemes Ordinance, e.g., MPF Employee Choice Arrangement • Personal Data (Privacy) Ordinance • Minimum Wage Ordinance • Sex Discrimination Ordinance • Disability Discrimination Ordinance • Family Status Discrimination Ordinance • Prevention of Bribery Ordinance • Occupational Safety and Health Ordinance ◆ Understand the legal definition of different aspects, including: <ul style="list-style-type: none"> • Continuous contract, wages • Paid leave, sick leave, maternity leave, sick leave due to work injuries • Computation and eligibility of severance payment, long service payment • Termination of the contract of employment ◆ Understand the meaning and importance of signing written employment contract <p>6.2 Apply general labour regulations</p> <ul style="list-style-type: none"> ◆ Follow the relevant legal requirements in recruitment exercises and daily operations and when terminating employment contracts, including: <ul style="list-style-type: none"> • Employee’s benefits in the Sex Discrimination Ordinance, Disability Discrimination Ordinance, Family Status Discrimination Ordinance and Employees’ Compensation Ordinance • Restrictions of Personal Data (Privacy) Ordinance on handling personal data of job applicants and employees ◆ Follow the provisions and conditions of employment according to the requirements of the Employment Ordinance, such as: <ul style="list-style-type: none"> • Wage period • Working hours • Rest day, statutory holiday, annual leave arrangement • Sickness allowance • Probation period and period of notice of termination of employment contract ◆ Comply with the provisions of the Mandatory Provident Fund Schemes Ordinance to contribute to the fund according to the time and rate <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Apply general labour regulations in relevant staff management routines

7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Comply with the labour regulations of Hong Kong and relevant requirements in staff management routines so as to protect the mutual benefits of the employer and employees and avoid disputes.
8. Remark	This UoC is adopted from 105002L2.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Human Resource Management & Development’

1. Title	Recruit and select personnel
2. Code	111374L3
3. Range	This unit of competency (UoC) is applicable to personnel management staff in the retail industry. Practitioners have the ability to select and recruit competent personnel for different posts in order to support the retail business of the organisation.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of staff recruitment and selection</p> <ul style="list-style-type: none"> ◆ Understand the duties and scope of work of different posts in the organisation ◆ Understand the human resources arrangement of the organisation, including current and estimated manpower that may require ◆ Master the established recruitment procedures and selection criteria of the organisation ◆ Understand the legislations related to recruitment of staff, e.g.: <ul style="list-style-type: none"> • Equal Opportunities Ordinance • Race Discrimination Ordinance • Personal Data (Privacy) Ordinance • Whether or not the candidate can legally work in Hong Kong ◆ Master the skills to recruit and select personnel, e.g.: <ul style="list-style-type: none"> • Skills to conduct the interview • Ability to revise the form and content of the recruitment test immediately <p>6.2 Recruit and select personnel</p> <ul style="list-style-type: none"> ◆ Select competent personnel to fill in different job vacancies in accordance with the established recruitment procedures of the organisation, including: <ul style="list-style-type: none"> • Listing the duties and entry qualifications for each job vacancy • Delivering the message of job vacancies through different media • Following the regulations of the organisation and legislative Requirement during recruitment • Appraising and selecting personnel according to the established standard of the organisation ◆ Use other appropriate appraisal methods other than interview for selection of staff, including: <ul style="list-style-type: none"> • Observing the actual performance of the candidate in the retail workplace • Observing the performance of the candidate through role play • Through the performance appraisal report prepared by the supervisor or third party ◆ Keep the documents and information about the recruitment and selection of personnel according to relevant legal requirements <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Follow the relevant legislation during recruitment and selection of personnel to avoid breaking the law
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Select competent personnel for different posts in accordance with the established standard for the selection and recruitment procedures of the organisation; and ◆ Keep the documents and information about the recruitment and selection of personnel according to relevant legal requirements according to relevant legal requirements
8. Remark	This UoC is adopted from 105003L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Human Resource Management & Development’

1. Title	Handle staff complaints
2. Code	111375L3
3. Range	This unit of competency (UoC) is applicable to human resources management staff in the retail industry. Practitioners have the ability to handle staff complaints according to the organisation’s codes, procedures, and guidelines.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of handling staff complaints</p> <ul style="list-style-type: none"> ◆ Understand the job nature and responsibilities of employees of different posts in the organisation ◆ Understand the code of practice that the employees follow in their daily work, including: <ul style="list-style-type: none"> • The fundamental ‘customer-oriented’ principle • The consumer protection ordinances and organisations ◆ Understand the importance of handling staff complaints ◆ Understand the codes, procedures, and guidelines of handling staff complaints ◆ Understand complaint methods and channels commonly used by employees and their effects, such as: <ul style="list-style-type: none"> • Written complaints, anonymous complaints, verbal complaints • Social media, mass media ◆ Master the skills of handling staff relationship, such as: <ul style="list-style-type: none"> • Communication skills • Understanding of employee psychology • Empathy <p>6.2 Handle staff complaints</p> <ul style="list-style-type: none"> ◆ Handle staff complaints according to the organisation’s codes, procedures, and guidelines on handling staff complaints <ul style="list-style-type: none"> • Listen to the complaints and encourage the employees to express their opinions • Understand the reasons, details and demands of their complaints • Respond to staff complaints or opinions • Find out the causes of complaints and suggest improvements, e.g. complaints arising from the interaction between: <ul style="list-style-type: none"> ○ Employees and customers ○ Employees ○ Employees and the management ◆ Document and file the records of complaints for follow-up and future reference ◆ Report to the management the staff complaints received and the follow-up situation <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Adhere to the professional code of conduct and treat complainant’s information in strict confidence
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Handle staff complaints according to the organisation’s codes, procedures, and guidelines; ◆ Respond to staff complaints or opinions; and ◆ Document and file the records of complaints for follow-up and future reference.
8. Remark	This UoC is adopted from 105004L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Human Resource Management & Development’

1. Title	Provide in-service training
2. Code	111376L3
3. Range	This unit of competency (UoC) is applicable to staff training personnel in the retail industry. Practitioners have the ability to understand the expertise that the staff should possess for performing daily routines; arrange selected staff to receive relevant systematic in-service training / fragmented learning at their workplace according to the staff training policy of the organisation, so as to continuously improve their professional performance.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of in-service training</p> <ul style="list-style-type: none"> ◆ Understand the established staff training policy and guidelines of the organisation ◆ Understand the purpose of providing staff training, e.g. to enhance productivity ◆ Know the strengths and limits of in-service training, e.g.: <ul style="list-style-type: none"> • Strengthen the partnership between the training instructors and the staff being trained • Save time and gear to the actual needs • Suitable for teaching basic skills ◆ Understand the method, purposes and functions of different types of in-service training, e.g.: <ul style="list-style-type: none"> • Personal coaching • Internal training • Promotion or transfer ◆ Understand the essentials of successful in-service training <p>6.2 Provide in-service training</p> <ul style="list-style-type: none"> ◆ Identify the staff need for in-service training according to appraisal reports or through consultation with the relevant staff ◆ Make preparations for the in-service training <ul style="list-style-type: none"> • Confirm the specific content of the in-service training programme, e.g. skills, techniques, knowledge • Select the appropriate mode of in-service training, e.g. technical demonstration, role play • Identify training methods that gear to the individual needs • Arrange competent and professional personnel to be training instructors ◆ Provide in-service training, including: <ul style="list-style-type: none"> • Explaining clearly to the staff being trained the connection between in-service training and real practice • Explaining clearly to the staff being trained the procedures, standard, and the safety and regulatory requirements of training • Demonstrating clearly the methods and steps of operating equipment and machines • Observing the staff response in order to know their level of understanding on the training content • Giving the staff being trained the opportunities to practise • Giving advice to the staff being trained • Making use of various media and producing appropriate training tools (e.g. demonstration videos) ◆ Review the overall performance and effectiveness of staff training in order to identify areas for improvement and revise the training content accordingly ◆ Record the performance progress of the staff being trained according to the established procedures of the organisation, and submit the report to appropriate personnel (e.g. human resources department, person in charge, etc.) <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the content of and techniques being taught in the training programmes meet the development trend of the industry ◆ Adjust training content according to different learning needs and styles

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Identify the staff need for in-service training and the professional skills they need, and use appropriate in-service training method to teach the skills; and ◆ Monitor and assess the training result, and identify areas for improvement.
8. Remark	This UoC is adopted from 105006L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Human Resource Management & Development’

1. Title	Implement human resources policies
2. Code	111377L3
3. Range	This unit of competency (UoC) is applicable to human resources management staff in the retail industry. Practitioners have the ability to handle recruitment, selection and staff complaints fairly and objectively according to the human resources policies of the organisation, so as to create good working environment and improve work efficiency of the staff.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of human resources</p> <ul style="list-style-type: none"> ◆ Understand the human resources policies, procedures and mechanism of the organisation, including: <ul style="list-style-type: none"> • Staff recruitment and selection • Staff deployment and attendance • Staff discipline and regulations • Staff complaints • Retention of staff ◆ Understand the skills and basic concept of personnel management ◆ Understand the common sources and causes of resistance to the newly amended or new human resources policies ◆ Understand the Labour Ordinance and related legal requirements of Hong Kong ◆ Know about the penalties for violating the Employment Ordinance and regulations ◆ Understand the abilities and skills for implementing human resources policies, e.g.: <ul style="list-style-type: none"> • Expression and speaking skills • Interpersonal skills • Mediation skills <p>6.2 Implement human resources policies</p> <ul style="list-style-type: none"> ◆ Formulate effective ways of implementing human resources policies, e.g.: <ul style="list-style-type: none"> • Formulate implementation procedures, and compile manuals or hand-outs for the new policies • Use effective channels to convey and explain the human resources system of the organisation to the staff, e.g.: <ul style="list-style-type: none"> ○ Training or induction programme ○ Briefing ○ Individual interview ○ Bulletin board ○ The Intranet • Set up and adopt appropriate channels to collect staff opinions in order to understand their level of acceptance or response of the policies, e.g. <ul style="list-style-type: none"> ○ E-mail ○ Suggestion box ○ Online survey ○ Conduct interviews as soon as possible with employees who have tendered resignation in order to understand their reasons to resign and take follow-up actions, e.g. to retain them • Have the employees signed to confirm that they understood and received documents related to the human resources policies ◆ Make use of communication and interpersonal skills to perform day-to-day personnel management tasks fairly according to the human resources management policies of the organisation and related legal requirements, e.g.:

	<ul style="list-style-type: none"> • Implement recruitment procedures • Arrange staff training • Implement disciplinary procedures • Handle staff complaints • Deploy staff • Conduct performance appraisals • Organise and arrange staff activities to enhance staff commitment to work and their sense of belonging to the organisation <ul style="list-style-type: none"> ◆ Monitor and assess what possible resistance and reactions may be encountered in the implementation of the amended or new human resources policies, and propose appropriate amendment to the higher level when necessary ◆ Monitor and review the effectiveness of the implementation procedures regularly, and make amendments in accordance with the organisation's needs and legislation update <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Implement human resources policies fairly and objectively ◆ Understand the changing trends in human resources management and workplace issues proactively
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Follow the established human resources policies of the organisation and related legal requirements and make use of various personnel management skills to perform personnel management tasks effectively in order to maintain staff relations; and ◆ Monitor and review the applicability and legality of the human resources policies of the organisation, and propose improvements in accordance with the organisation needs and legal requirements.
8. Remark	This UoC is adopted from 105008L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Human Resource Management & Development’

1. Title	Promote equality policy
2. Code	111378L3
3. Range	This unit of competency (UoC) is applicable to personnel management staff in the retail industry. Practitioners have the ability to perform non-routine tasks, promote the established equality policy of the organisation when performing personnel management tasks and in workplace and ensure that the policy complies with relevant legal requirements.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of equality policy</p> <ul style="list-style-type: none"> ◆ Understand the equal opportunities and anti-discrimination policy of the organisation ◆ Understand the basic coverage of the equality policy, e.g. sex, disability, race and equal opportunities ◆ Understand the purpose and benefit of implementing equality policy ◆ Master the government and regulatory bodies’ legal requirements on equal opportunities, e.g.: <ul style="list-style-type: none"> • Race Discrimination Ordinance • Sex Discrimination Ordinance • Disability Discrimination Ordinance • Family Status Discrimination Ordinance ◆ Understand retail trade unions’ requirements on equal opportunities <p>6.2 Promote equality policy</p> <ul style="list-style-type: none"> ◆ Regularly arrange employees of different positions to participate in trainings, workshops and activities related to equality policy to promote their awareness of the equality policy ◆ Convey and promote the equality policy of the organisation to employees at different levels through communication channels ◆ Promote the equality policy effectively when performing human resources management tasks and in workplace ◆ Carry out equality impact assessments (EIA) on workplace procedures or guidelines to identify equal opportunities items and measures that need to be improved or strengthened, such as: <ul style="list-style-type: none"> • Advertisement content • Selection criteria • Staff remuneration and benefits • Staff retaining policy and promotion criteria • Job opportunities for persons with disability ◆ Review the performance and effectiveness of the equality policy of the organisation regularly and recommend improvements to the higher level or relevant departments, ensuring that the policy complies with the legal requirements <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that employees with different backgrounds are equally treated without any discrimination ◆ Ensure that the equality policy implemented complies with the legal requirements
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Promote equality policy effectively when performing human resources management tasks and in workplace; and ◆ Review the effectiveness of the equality policy of the organisation to identify areas for improvement or deficiencies, recommend improvements to the higher level/relevant departments.
8. Remark	This UoC is adopted from 105009L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Human Resource Management & Development’

1. Title	Implement staff appraisal policy
2 Code	111379L3
3. Range	This unit of competency (UoC) is applicable to personnel management staff in the retail industry. Practitioners have the ability to implement the established staff appraisal policy and standards of the organisation objectively in order to achieve effective human resources management.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of staff appraisal</p> <ul style="list-style-type: none"> ◆ Understand the established policy, standards and mechanism of staff appraisal of the organisation ◆ Understand the functional areas and acceptable level of performance for staff of different posts of the departments ◆ Master the details of the performance appraisal system and standards of the organisation, including: <ul style="list-style-type: none"> • Form, method and procedure of appraisal • Requirements on the appraiser • Appraisal time • Rating standards and definition • Appeal mechanism for the appraisee • Criteria for writing appraisal reports ◆ Understand the purpose and importance of performance appraisal, including: <ul style="list-style-type: none"> • Benefit of the organisation / department • Benefit of the staff member ◆ Understand different types of performance appraisal ◆ Understand the content of general performance appraisals, including: <ul style="list-style-type: none"> • Knowledge and professional ability • Work efficiency • Work performance • Degree of diligence • Work attitude and initiative • Team relationship • Personal conduct ◆ Understand the reward and penalty mechanism of the organisation ◆ Understand the ordinances and regulations of the government and regulatory bodies for handling staff appraisal <p>6.2 Implement staff appraisal policy</p> <ul style="list-style-type: none"> ◆ Select a suitable appraisal method according to the performance appraisal standards and procedures of the organisation ◆ Communicate with the staff according to the work objectives, plans and standards of each department and build a consensus on performance requirements and appraisal standards ◆ Observe the performance of the staff continuously in daily operation ◆ Conduct a fair and objective appraisal and write the appraisal report for the staff ◆ Inform the staff concerned about the appraisal result through proper communication channel and make recommendations on improvement ◆ Establish appeal mechanism for staff to make their appeals ◆ Recommend suitable follow-up actions according to the appraisal result, such as: <ul style="list-style-type: none"> • Giving reward or penalty • Counselling • Training ◆ File the appraisal report according to procedures <p>6.3 Exhibit professionalism</p>

	<ul style="list-style-type: none"> ◆ Ensure that the principle of justice and fairness and relevant legal requirements are observed when implementing staff appraisal policy ◆ Understand the changing trends in performance management proactively
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Implement the established staff appraisal policy and standards of the organisation objectively; and ◆ Take suitable follow-up measures, e.g. giving reward or penalty, training, etc.
8. Remark	This UoC is adopted from 105011L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Human Resource Management & Development’

1. Title	Implement “clean” business practices, good controls and integrity management
1. Code	111380L3
2. Range	This unit of competency (UoC) is applicable to managerial / supervisory staff of a retail business. Practitioners have the ability to implement “clean” business practices, proper controls and good integrity management in day-to-day operations, and helping their companies adopt and put in place relevant practices and measures.
3. Level	3
4. Credits	3 (for reference only)
5. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of anti-bribery legislation, risk areas in the industry and basic principles of “clean” business practices, internal control and good integrity management</p> <ul style="list-style-type: none"> ◆ Understand the key legal requirements of the Prevention of Bribery Ordinance (Cap. 201) ◆ Understand the professional standards and/or regulatory requirements where applicable ◆ Understand the company’s code of conduct and house rules ◆ Make sure company staff understand the above requirements and the “clean” business practices in line with the requirements ◆ Understand and be aware of the importance of staff integrity issues in relation to the company business, and manage them effectively ◆ Understand the importance of avoiding, declaring and managing conflict of interest ◆ Understand the key elements of a good integrity management programme for an organisation and how to implement it ◆ Be aware of the risks of corruption/malpractice in various common functions / processes in the industry ◆ Understand the principles of good internal control and preventive measures, and their application to common functions / processes ◆ Understand the role and duty of a supervisor in respect of managing staff integrity, exercising proper supervisory controls and ensuring “clean” business practices in day-to-day operations <p>6.2 Implement “clean” business practices, good controls and integrity management</p> <ul style="list-style-type: none"> ◆ Advise and assist top/senior management to adopt, and assist the company to implement, “clean” business practices, internal controls and integrity management programme (e.g. company code of conduct and house rules) ◆ Assess the comprehensiveness of the company code of conduct to ensure inclusion of the essential integrity requirements (e.g. prohibition of bribery, disallowing acceptance, solicitation and offer of advantage, avoidance and declaration of conflict of interest, confidentiality, reporting of suspected corruption and criminal offences, etc.) ◆ Make the subordinates and other staff well understand the company’s code of conduct and house rules ◆ Devise measures for effective implementation of the company code of conduct and house rules (e.g. procedures for managing conflict of interest, proper channels for reporting breaches of integrity requirements and other malpractices) ◆ Exercise effective supervision over their staff and day-to-day operations (in respect of ensuring integrity and “clean” business practices) ◆ Respond to integrity issues and challenges, and provide guidance/advice to subordinates/management, and/or assist the company, in managing such issues ◆ Inspire upon and set examples for subordinates and other staff on integrity and “clean” business practices ◆ Provide training for staff to enhance staff awareness of integrity issue and clean business practices ◆ Establish and implement effective and adequate control measures (e.g. clear work procedures and guidelines, checks and balances) to mitigate the risks of corruption/malpractice in the key retail business operations ◆ Understand the concept of supervisory accountability and perform the duties accordingly <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Implement integrity management, raise staff awareness of the anti-bribery law and integrity issues, guide and educate them on such matters

	<ul style="list-style-type: none"> ◆ Adopt and implement “clean” business practices and suitable internal controls in various common functions / processes
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Be capable of understanding / applying knowledge in the basic legal requirements of anti-bribery law; ◆ Be capable of assisting the company in implementing good integrity management; and ◆ Be capable of assisting the company in adopting and implementing “clean” business practices and basic/key internal controls to mitigate the risks of corruption/malpractice in the retail industry and its key business functions.
8. Remark	This UoC is adopted from 105752L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Human Resource Management & Development’

1. Title	Manage the human resources information system
2. Code	111381L4
3. Range	This unit of competency (UoC) is applicable to personnel management staff in the retail industry. Practitioners have the ability to manage the human resources information system of the organisation and ensure that the system matches the personnel policy and management procedures of the organisation.
4. Level	4
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of human resources information system</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s established personnel management policy and related procedures ◆ Understand the detailed operation of the organisation’s human resources information system, including: <ul style="list-style-type: none"> • Record of human resources information • Duration for keeping and depth of coverage of the information record • Functions and information accessible by users • Functional limits of the software ◆ Master the ability to draft a detailed proposal of human resources information system ◆ Master the ability to communicate with the information system supplier and executives ◆ Master the ability to organise and plan the information system ◆ Master the ability to handle relevant software and hardware <p>6.2 Manage the human resources information system</p> <ul style="list-style-type: none"> ◆ Confirm the internal information that should be kept in the human resources information system, such as: <ul style="list-style-type: none"> • Staff expertise • Different forms of staff remuneration and benefits • Staff relations and industrial relations • Staff support • Legal requirements on human resources • Work performance management • Ways to recruit and retain competent personnel • Staff deployment or arrangement • Staff resignation and dismissal • Workforce planning ◆ Ensure normal operation of the human resources information system during day-to-day management, including: <ul style="list-style-type: none"> • Paying attention to new / updated requirements on human resources information • Choosing a new human resources information system or updating the existing one • Using the new or updated human resources information system • Monitoring and assessing the performance of the information system ◆ Review the monitoring and assessment results of the human resources information system regularly and put forward suggestions for improvement <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the information provided by the human resources information system does not violate the privacy ordinance and is in proper use ◆ Understand the changing trends in human resources information system proactively

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Manage the organisation's human resources information system for support of its personnel policy and management procedures; and ◆ Inspect and maintain the human resources information management system regularly to ensure its normal operation.
8. Remark	This UoC is adopted from 105012L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Human Resource Management & Development’

1. Title	Analyse training needs and develop staff training and development programmes
2. Code	111382L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for training and development in the retail industry. Practitioners have the ability to make careful analysis and judgment on the need for staff training, and develop appropriate training programmes to improve the quality of staff.
4. Level	4
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of staff training</p> <ul style="list-style-type: none"> ◆ Understand the organisational structure and function of each department ◆ Know the competency requirements of each post in the organisation ◆ Understand the theory of human resources management ◆ Understand the requirements of professional accreditation for specific jobs in the retail industry, e.g. registered pharmacist in drug store ◆ Understand the theory of staff training in the retail industry <ul style="list-style-type: none"> • Purposes of training • Training methods • Evaluation methods • Training system ◆ Understand the characteristics, functions and advantages of various training methods, e.g.: <ul style="list-style-type: none"> • In-housing training • Continuous learning • In-service training <p>6.2 Analyse training needs and develop staff training and development programmes</p> <ul style="list-style-type: none"> ◆ Appraise the working competency of the current staff in accordance with the existing human resources, analyse the competency of the staff and the need for training in the department, including professional training ◆ Assess the requirements for manpower in the foreseeable future according to the development of the business of the organisation ◆ Analyse employees ability and training needs in the department, including professional training ◆ Establish the necessary staff training programmes for selected person with priorities ◆ Develop training programmes according to the internal successor / promotion plans of the organisation ◆ Select appropriate training method according to the special requirements of the department, internal training capacity, characteristics of the expected requirement on skills and the supply of the training market ◆ Prepare a complete training programme using the above-mentioned details ◆ Review the effectiveness of staff training and revise staff training programmes accordingly <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the training programmes can meet the requirements of the organisation and the development trend of the industry ◆ Adjust training content according to different learning needs and styles
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Develop appropriate training programmes according to the training needs of staff of the organisation to improve the quality of the staff; and ◆ Review the effectiveness of staff training programmes and put forward improvement suggestions.
8. Remark	This UoC is adopted from 105014L4. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Human Resource Management & Development’

1. Title	Handle general labour disputes
2. Code	111383L4
3. Range	This unit of competency (UoC) is applicable to human resources management staff in the retail industry. Practitioners have the ability to use personnel management skills to handle general labour disputes.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of human resources management</p> <ul style="list-style-type: none"> ◆ Master the policy and guidelines of the organisation in handling labour disputes ◆ Understand ordinances, regulations, and penalties related to employment relationship and related statutory bodies, such as: <ul style="list-style-type: none"> • Structure of the Labour Department and relevant ordinances <ul style="list-style-type: none"> ○ Labour Relations Ordinance ○ Employment Ordinance ○ Employees’ Compensation Ordinance ○ Occupational Safety and Health Ordinance ○ Prevention of Bribery Ordinance • Mandatory Provident Fund Schemes Authority and relevant ordinances • Office of the Privacy Commissioner for Personal Data and relevant ordinances • Equal Opportunities Commission and relevant ordinances <ul style="list-style-type: none"> ○ Organisation background and terms of reference ○ Sex Discrimination Ordinance ○ Disability Discrimination Ordinance • Independent Commission Against Malpractice and relevant ordinances ◆ <p>6.2 Handle general labour disputes</p> <ul style="list-style-type: none"> ◆ Use personnel management skills (e.g. point out what team members have done well and provide specific examples in public meetings) to establish effective communication channels to reduce unnecessary labour disputes and legal proceedings ◆ Comply with and quote relevant legal provisions during human resources management routines to handle general labour disputes, such as: <ul style="list-style-type: none"> • Employment relationship • Calculation and payment of wages and commissions • Forfeiture of payment • Deployment arrangement • Immediate dismissal • Severance payment, long service payment • Mandatory provident fund contributions ◆ Handle injuries at work correctly according to legal requirements, such as: <ul style="list-style-type: none"> • Report accidents punctually • Pay the instalments and relevant medical expenses • Medical clearance and handling procedures ◆ Report to the higher level and seek legal professional help according to the established procedures and guidelines of the organisation once the labour dispute involves legal proceedings <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure compliance with relevant legal requirements when handling general labour disputes ◆ Understand the changing trends in industrial relations proactively (e.g. collect information, attend seminars)

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Master ordinances related to employment relationship and use personnel management skills to handle general labour disputes; and ◆ Disseminate information and regulations on employment relationship and give clear guidelines and direction to employees through effective communication channels.
8. Remark	This UoC is adopted from 105015L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Human Resource Management & Development’

1. Title	Handle staff remuneration and benefits
2. Code	111384L4
3. Range	This unit of competency (UoC) is applicable to human resources management staff in the retail industry. Practitioners have the ability to effectively handle the matters concerning staff remuneration and benefits in accordance with the human resources management system of the organisation and legal requirements so as to achieve personnel management.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of staff benefit policy</p> <ul style="list-style-type: none"> ◆ Master the personnel management and the staff remuneration and benefit policies of the organisation ◆ Understand the methods and basic criteria of calculation for different ranks and different forms of remuneration in the organisation ◆ Understand the remuneration system, structure and adjustment mechanism of the organisation, including basic salary, commission, incentive allowance, bonus, performance bonus, etc. ◆ Master the staff benefit policy of the organisation, including: <ul style="list-style-type: none"> • Medical benefits • Dental benefits • Housing allowance • Education and training allowance • Retirement benefits ◆ Understand the legal requirements related to the existing staff remuneration and benefit system, e.g.: <ul style="list-style-type: none"> • Minimum wage • Labour insurance • Mandatory Provident Fund Schemes (MPF) ◆ Understand the basic elements of a staff remuneration and benefit system, including being fair, reasonable and competitive ◆ Know about good communication and negotiation skills ◆ Master newly amended legal requirements and the development trend of remuneration and benefits of the retail industry <p>6.2 Handle staff remuneration and benefits</p> <ul style="list-style-type: none"> ◆ Let all the staff members clearly understand and easily access the detail information of the staff benefit policy through effective communication channels, e.g.: <ul style="list-style-type: none"> • Provide a clear and comprehensible staff benefit manual to new recruits • Release benefit information to the staff regularly, e.g. through the intranet • Post benefit information at workplace areas that can be easily seen • Develop ways and channels to collect staff feedback ◆ Implement the remuneration and commission system according to human resources management policies of the organisation and related legal requirements ◆ Handle the matters concerning the remuneration and benefits of individual employees according to the staff benefit system and procedures of the organisation, e.g.: <ul style="list-style-type: none"> • Process claims of all kinds of allowances, e.g. verification of eligibility, amount of allowance • Calculate and pay benefits, e.g. bonuses • Adjust the remuneration and benefit portfolio of individual employees if a dispute arises, arrange negotiation for the employee concerned and his/her supervisor or representative of the personnel department in order to reach a consensus and sign to confirm • Document and save related staff benefit information ◆ Recommend appropriate improvements to the staff benefit system in accordance with the human resource market situation so as to enhance the sense of belonging and work performance of the staff

	<ul style="list-style-type: none"> ◆ Organise different types of staff activities (e.g. set up wellness centre) and events related to wellness (e.g. talks, workshops and health tests) to promote a health-conscious lifestyle to all staff and encourage them to take care of their physical and mental health in the long run in order to have good work performance <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the staff remuneration and benefit system of the organisation is competitive in the human resource market and can retain competent personnel ◆ Understand the changing trends in retention and compensation management proactively
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Handle the staff benefit matters impartially according to the remuneration and benefit system of the organisation and in compliance with the legal requirements; ◆ Use communication and negotiation skills effectively to negotiate with individual employees on the conditions of remuneration and benefits in accordance with the situation; and ◆ Recommend appropriate adjustments to the management on the remuneration and benefit system with respect to the market change and actual operational needs of the organisation so as to achieve personnel management.
8. Remark	This UoC is adopted from 105016L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Human Resource Management & Development’

1. Title	Formulate a staff training and development plan
2. Code	111385L5
3. Range	This unit of competency (UoC) is applicable to human resources management staff in the retail industry. Practitioners have the ability to formulate staff training and people development plan to improve the skills and knowledge of the staff in order to facilitate the business development of the organisation.
4. Level	5
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of staff training</p> <ul style="list-style-type: none"> ◆ Understand the organisational structure and function of each department ◆ Master the skills and competency requirements of each post ◆ Understand the theory of human resources management, e.g.: <ul style="list-style-type: none"> • Recruitment • Training • Remuneration • Benefits • Labour legislation ◆ Understand the professional accreditation of the retail industry from the government / professional organisations ◆ Understand the skills upgrading training programmes accredited by the government / training institutions ◆ Understand the recognised qualifications and training requirements of the general retail organisation ◆ Master the functions and characteristics of the products/service of the organisation <p>6.2 Formulate a staff training and development plan</p> <ul style="list-style-type: none"> ◆ Appraise the work performance of the current staff according to the job requirements of different departments ◆ Analyse the difference between the ability and the expected competency of the current staff to assess the training needs and establish necessary training programmes for selected staff with priorities ◆ Critically assess the requirements of manpower and skills in the foreseeable future according to the trend of development of the retail industry ◆ Formulate training programmes according to the internal successor / promotion plans of the organisation ◆ Select appropriate training methods according to the special requirements of different departments, internal training capacity and the supply of the training market ◆ Provide adequate training resources to meet the development needs of staff ◆ Ensure that each department has adequate number of staff to maintain smooth operation during staff training ◆ Evaluate the effectiveness of staff training programmes so as to assess whether the staff can obtain the expected technical knowledge and improve work efficiency through the training ◆ Review the effectiveness of the staff training system and policy of the organisation regularly ◆ Assess the data set regularly for reporting to the superior about the implementation of staff training programmes, and put forward suggestions for improvement of the staff training and development plan <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the training and development plan can help to improve the quality of the staff, and meet the need of the organisation and the development trend of the industry ◆ Understand the changing trends in staff and talent development proactively

7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Formulate a staff training and development plan in accordance with the objective of development and resources of the organisation; provide useful training on skills and knowledge to improve the quality of the staff and promote the development of the business of the organisation.
8. Remark	This UoC is adopted from 105017L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Human Resource Management & Development’

1. Title	Formulate a staff retention plan
2. Code	111386L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for the formulation of human resources policies in the retail industry. Practitioners have the ability to understand the overall human resources condition and the needs of the staff at different positions; and to formulate a staff retention plan to retain competent personnel with good performance.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of staff relations</p> <ul style="list-style-type: none"> ◆ Master the human resources strategy and system of the organisation ◆ Understand the business policy and development of the organisation ◆ Understand the requirements of the organisation on the job competencies for different posts ◆ Understand the reasons for staff turnover (e.g. resignation, layoff, organisational / business restructure, retirement, end of contract, or summary dismissal) ◆ Know the basic causes of staff turnover, such as: <ul style="list-style-type: none"> • Working environment and job nature • Human relations • Salary and benefits • Competency mismatch • Economic environment ◆ Understand the staff turnover situation of the organisation and the effect on its business ◆ Know the benefits of reducing staff turnover rate to the organisation ◆ Understand the Labour Ordinance and relevant legal requirements <p>6.2 Formulate a staff retention plan</p> <ul style="list-style-type: none"> ◆ Establish an effective exit interview mechanism to find out why the staff are leaving ◆ Establish a good communication mechanism to know the staff grievances and their requirements for the jobs or the organisation ◆ Conduct staff turnover statistics and analysis to find out the main reasons for the turnover ◆ Formulate staff relations schemes according to the operational characteristics of different units in order to strengthen their sense of belonging ◆ Formulate a staff retention plan in response to the causes of staff turnover according to the business policy and development of the organisation in order to retain competent personnel and reduce staff turnover rate (e.g. the staff recruitment policy, terms of employment, promotion mechanism) ◆ Formulate succession planning according to the situation of the organisation in order to maintain a smooth operation of the organisation ◆ Formulate implementation guidelines for the staff retention policy consistent with the human resources policies and procedures of the organisation ◆ Review and assess the effectiveness of the staff retention plan regularly, and make adjustment according to the needs of the organisation <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the staff retention plan formulated is consistent with the overall human resources policy of the organisation and the legal requirements ◆ Ensure that the staff retention plan of the organisation is competitive on the human resources market, can retain competent personnel and reduce staff turnover
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Master the causes and data of staff turnover through an effective communication mechanism; and ◆ Formulate a staff retention plan according to the business development policy and staff turnover situation of the organisation in order to retain competent personnel and reduce the turnover rate.
8. Remark	This UoC is adopted from 105018L5.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Human Resource Management & Development’

1. Title	Apply methods to improve team execution capacity
2. Code	111387L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for human resources management in the retail industry. Practitioners have the ability to improve team execution capacity through integration of the three main processes in corporate including personnel, strategy and operation of plan. Transform the corporate strategy into the systematic method of corporate operation practice could improve team execution capacity and the corporate development.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the concept of execution</p> <ul style="list-style-type: none"> ◆ Understand the importance of improving team execution for corporate development ◆ Macro aspects - whether the formulated strategy, visionary planning, long-term goals can be implemented ◆ Micro-level - whether each department or individual can take the initiative and achieve the target on time which would turn into value-added results <p>6.2 Apply methods to improve team execution capacity</p> <ul style="list-style-type: none"> ◆ Establish communication channels to collect comments and responses ◆ Coordinate internal resources and effectively solve the problem ◆ Enable managers to develop supervision and incentive system based on the work target ◆ Enable employees to understand their work objectives ◆ Establish effective execution training to improve staff ability and willingness to work ◆ Establish a moderately stressful working environment which will help improving the executive capacity of the staff ◆ Enhance staff responsibility and work motivation ◆ Allow employees to actively participate in making reasonable recommendations and understand the corporate vision and strategy <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure long-term stability of enterprises in managing the team executive capacity ◆ Maintain a proper balance between the corporate and the overall interests of employees
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Recognise the concept and value of execution capacity; ◆ Understand the importance of improving team execution capacity; and ◆ Improve the team execution capacity.
8. Remark	This UoC is adopted from 107273L5. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Human Resource Management & Development’

1. Title	Formulate human resources strategy and policies
2. Code	111388L6
3. Range	This unit of competency (UoC) is applicable to staff responsible for policy formulation in the retail industry. Practitioners have the ability to formulate suitable and effective human resources strategy and policies in accordance with the business development of the organisation.
4. Level	6
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of human resources strategy</p> <ul style="list-style-type: none"> ◆ Understand the organisational structure and function of each department ◆ Understand the operating policy and strategy of the organisation ◆ Master the skills and competency requirements of each post ◆ Understand the short-, mid- and long-term development plans and direction of the organisation ◆ Master the manpower market conditions and characteristics of the industry and overall society ◆ Master the business operation and development of the organisation, including: <ul style="list-style-type: none"> • Financial situation • Operating costs • Percentage of staff costs in operating costs • Organisation’s requirements on the quality of operation ◆ Understand the education and manpower development policy of the industry and overall society ◆ Understand the industry’s requirements on new technology and knowledge ◆ Understand the workflow and characteristics of retail operation, including: <ul style="list-style-type: none"> • Shift duty system • Overtime work • Working on holidays ◆ Understand the existing legal norm related to human resources <p>6.2 Formulate human resources strategy and policies</p> <ul style="list-style-type: none"> ◆ Analyse existing human resources in view of the short-, mid- and long-term development plans and operation strategy of the organisation to see if they meet the business needs ◆ Analyse the staff wastage of the organisation as well as the supply and demand of the manpower market ◆ Assess the manpower demand in respect to factors such as staff turnover, retirement, suspension as well as number of staff on leave and study ◆ Forecast the future development or shrinkage of the organisation so as to assess the types and numbers of job positions to be increased or decreased ◆ Assess the future trend of salary and benefits in the manpower market ◆ Review the recruitment policy and the effectiveness of the incentive system of the organisation ◆ Assess the training and development needs of the organisation ◆ Formulate suitable human resources strategy and policies (including succession planning) according to the operation policy and development strategy of the organisation to meet the development needs ◆ Compile reports to illustrate human resources strategy and the implementation of policies <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure compliance with relevant laws when formulating human resources strategy and policies ◆ Ensure that the human resources strategy and policies of the organisation can retain competent staff so as to prevent wastage or shortage of manpower

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Formulate human resources strategy and policies according to the development goals and resources of the organisation; and ◆ Ensure that the human resources strategy and policies formulated favours the development of the organisation and prevents wastage or shortage of manpower.
8. Remark	This UoC is adopted from 105019L6. The UoC title is revised.

Units of Competency for 'Data Analytics'

Specification of Competency Standards for the Retail Industry
Units of Competency for 'Data Analytics'

1. Title	Perform website traffic analytics
2. Code	111389L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for data analytics in the retail industry. Practitioners have the ability to apply website traffic analysis tool to collect data for statistical analysis so as to provide the basis for online marketing strategy formulation.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the major indexes and their statistical meaning of website traffic</p> <ul style="list-style-type: none"> ◆ Understand the meaning of major indexes of website traffic, including: <ul style="list-style-type: none"> • Page views (PV) • Independent internet protocol (IP) • Number of independent visitors (UV) • Number of repeat visitors (RV) • Average views • New independent visitors • Times of page display <p>6.2 Perform website traffic analytics</p> <ul style="list-style-type: none"> ◆ Apply web analytics tools to monitor traffic <ul style="list-style-type: none"> • Master the traffic monitoring methods of different types of websites (e.g. business websites, blog websites) • Obtain an overview of how visitors visit the website and present the findings both in written and chat formats <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Not use the statistical data to damage the interests of corporate and customers ◆ Comply with the relevant regulatory requirements in processing the data
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Understand the meaning of major indexes of website traffic; and ◆ Monitor the basic traffic information of different types of websites.
8. Remark	This UoC is adopted from 107195L3. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for 'Data Analytics'

1. Title	Perform website traffic time analytics
2. Code	111390L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for data analytics in the retail industry. Practitioners have the ability to apply website traffic time analysis tool to collect data of website traffic at different timeslots for statistical analysis so as to provide the basis for online marketing strategy formulation.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the major indexes and their statistical meaning of website traffic time</p> <ul style="list-style-type: none"> ◆ Understand the meaning of major indexes of website traffic time, including: <ul style="list-style-type: none"> • 24 hours flow (e.g. PV, IP, UV) • Yesterday statistics • Statistics of the month • Daily average • The highest and lowest traffic in history <p>6.2 Perform website traffic time analytics</p> <ul style="list-style-type: none"> ◆ Apply web analytics tools <ul style="list-style-type: none"> • Perform statistics to obtain an overview of the time periods when visitors visit the website • Present the findings in written format • Present the findings in statistical charts <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Not use the statistical data to damage the interests of corporate and customers ◆ Comply with the relevant regulatory requirements in processing the data
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Use web analytics tools to perform website traffic time analytics, and ◆ Present the findings in written format and statistical charts.
8. Remark	This UoC is adopted from 107196L3. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Data Analytics’

1. Title	Perform website visitor analytics
2. Code	111391L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for data analytics in the retail industry. Practitioners have the ability to apply website analysis tool to collect data of website visitors for statistical analysis so as to provide the basis for online marketing strategy formulation.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand data collection and statistic process of website visitors</p> <ul style="list-style-type: none"> ◆ Apply web analytics tools to collect visitor data, including: <ul style="list-style-type: none"> • Visitor distribution areas • Observe the visitors’ 24-hour traffic data based on different regions • Use registration information to collect statistical data (including visitors age, gender, occupation, income, hobbies and behavioural habits) <p>6.2 Perform website visitor analytics</p> <ul style="list-style-type: none"> ◆ Carry out statistical analysis and present the findings in written format and statistical charts according to the corporate requirements <ul style="list-style-type: none"> • Use the collected data for statistical analysis • Use the statistical charts to present the analysis results • Present the results in oral or written reports as data support for marketing and different departments <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Comply with the Personal Data (Privacy) Ordinance in collecting data for process
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Apply web analytics tools for analysis and present the findings in statistical charts; and ◆ Present the results in oral or written reports as data support for marketing and different departments.
8. Remark	This UoC is adopted from 107197L3. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Data Analytics’

1. Title	Perform search engine analytics
2. Code	111392L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for data analytics in the retail industry. Practitioners have the ability to evaluate the effectiveness of different search engine through search engine and keyword analysis. The analysis result is used as basis for online marketing strategy formulation.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the methods to perform search engine analytics</p> <ul style="list-style-type: none"> ◆ Understand search engine data <ul style="list-style-type: none"> • Understand the meaning of different search engine data (including searches, IP, unique visitors, per-view, page dwell time) • Understand the total search volume, the main engine search volume of the recent trend (e.g. within 30 days) ◆ Understand keyword statistics methods <ul style="list-style-type: none"> • Count the number of searches, IP, unique visitor and new visitors etc. from different usage of keywords ◆ Understand the recent search <ul style="list-style-type: none"> • Collect and study the visitor data from the search engine (including visiting time, visitor area, search engine, keywords and visit pages) <p>6.2 Perform search engine analytics</p> <ul style="list-style-type: none"> ◆ Present search engine analytics results in statistical charts <ul style="list-style-type: none"> • Present the results in oral or written reports as data support for marketing and different departments of the corporate <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Comply with the Personal Data (Privacy) Ordinance in collecting data for process
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Master search engine analytics tools and present the results in statistical charts; and ◆ Apply the analytics results to provide data support for marketing and different departments.
8. Remark	This UoC is adopted from 107198L3. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Data Analytics’

1. Title	Perform customer order analytics
2. Code	111393L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for data analytics in the retail industry. Practitioners have the ability to calculate statistics about order category, destination, price and channel as basis for the online marketing strategy formulation.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the basic indicators and methods for performing customer order analytics</p> <ul style="list-style-type: none"> ◆ Collect customer order data and perform analytics, the data types include: <ul style="list-style-type: none"> • Order time • Order category (prepaid / non-prepaid) • Destination • Order price (price segment) • Order channel (source) <p>6.2 Perform customer order analytics</p> <ul style="list-style-type: none"> ◆ Use the data for improvement suggestions <ul style="list-style-type: none"> • Understand the meaning of each set of data in order to make improvement suggestions <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Comply with the Personal Data (Privacy) Ordinance in collecting data for process
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Master customer order analytics tools and present the results in statistical charts; and ◆ Apply the analytics results to provide data support for marketing and different departments.
8. Remark	This UoC is adopted from 107199L3. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Data Analytics’

1. Title	Analyse website data and prepare report
2. Code	111394L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for data analytics in the retail industry. Practitioners have the ability to analyse website data and prepare report. Provide comments for the analysis (e.g. evaluating a product or an operational event). Report the existing problems of the market and propose solutions as reference for management decision.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the methods of building data analysis model</p> <ul style="list-style-type: none"> ◆ Master the basic website data analysis report model (e.g. using user stickiness analysis models to analyse customer loyalty to brands or products) ◆ Understand the commonly used data indicators in the model (e.g. user stickiness analysis models often use the number of days and hours users log in, changes in stickiness trends of different user groups, etc. as data indicators) ◆ Establish the methods of building data analysis models (e.g. Set the distribution of the number of days that users checked in last week, the distribution of the number of people who checked in more than twice a week, etc. to establish a user stickiness analysis model) <p>6.2 Analyse website data and prepare report</p> <ul style="list-style-type: none"> ◆ Analyse website data <ul style="list-style-type: none"> • Establish the perspective of business analysis, create data model according to the needs of the analysis objectives, and select the specific data for analysis • Filter the data and remove redundant and erroneous data. Consolidate useful data for further process ◆ Prepare written and chart formats to present the analysis results <ul style="list-style-type: none"> • Present the analysis results with correct charts and precise written language • Analyse the strengths and weaknesses of the website and provide solution for improving the weaknesses of the website <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure the accuracy and timeliness of the analysis report content and data ◆ Abide by ethical conduct and integrity attitude for the preparation of analysis reports. Prevent false acts.
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Establish the perspective and analytical framework, and prepare the analysis report accordingly; ◆ Provide data basis for each analysis; ◆ Use charts to present questions and conclusions; and ◆ Analyse the cause of the problem and propose solutions.
8. Remark	This UoC is adopted from 107200L4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Data Analytics’

1. Title	Analyse customers’ purchase patterns
2. Code	111395L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for data analytics in the retail industry. Practitioners have the ability to apply the customer behaviour and preference analysis to understand the customer needs and enhance customer experience. Enhance the usability of website and promote sales success rate. Provide basis for developing the online marketing strategy and website management process.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Compare and analyse different internet customer purchase processes</p> <ul style="list-style-type: none"> ◆ Master the “Buy Now” process <ul style="list-style-type: none"> • Customers complete the online purchase immediately by going to fill the order page • Advantages <ul style="list-style-type: none"> ○ Simple steps of operation • Disadvantages <ul style="list-style-type: none"> ○ Only purchase one product at a time ○ Could not improve the customer unit price. Customers finish the selection of product immediately after pressing the buy button means that the customers no longer continue to buy other products ◆ Master the “Shopping Cart” process <ul style="list-style-type: none"> • Customers stay in the shopping website such that they could continue to buy other products • Advantages <ul style="list-style-type: none"> ○ Improve the customer unit price as the user could buy more products • Disadvantages <ul style="list-style-type: none"> ○ More operating steps for customers (e.g. If no clear guidelines for purchase, customers may have bad experience with shopping cart which result in the loss of customers) ◆ Master the change of purchase behaviour of online customers <ul style="list-style-type: none"> • Understand purchase behaviour of online customers, including: <ul style="list-style-type: none"> ○ Attention ○ Interest ○ Search ○ Action ○ Share • Understand the importance to the search of product information by online customers, and information sharing after the product purchase • Compare and analyse the different features of website to affect the customers’ purchase behaviour, including: <ul style="list-style-type: none"> ○ According to the different contact points of website to provide customers detailed product explanation ○ Facilitate the word of mouth between customers to enhance the basis for customer purchase decision <p>6.2 Analyse customers’ purchase patterns</p> <ul style="list-style-type: none"> ◆ Analyse the site to the domain name, website pages, website classification and other information ◆ Implement website survey analysis including interviewed domain name, interview page, station exports, station entrance and other information ◆ Analyse page dwell time ◆ Analyse bounce rate <ul style="list-style-type: none"> • Count the website’s bounce rate • Count the bounce rate for different pages (homepage, middle page, purchase page, etc.) ◆ Implement customer loyalty analysis (e.g. the number of visitors for visiting one, two, three,

	<p>ten or more than ten times; and the percentage of these visitors under the whole visitor number)</p> <ul style="list-style-type: none"> ◆ Analyse visitor repeat purchase frequency and cycle. The analysis results could give reference to the marketing plan and guideline for the appropriate time to reach users ◆ Apply the analysis data to propose improvement solution <ul style="list-style-type: none"> • Understand the meaning of each statistical expression. Observe the problems of corporate marketing strategy and propose improvement solution <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Comply with the Personal Data (Privacy) Ordinance in collecting data for process
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Apply the methods and tools to conduct customer behaviour analysis and present the analysis results in statistical charts; and ◆ Evaluate the real customer needs behind the data and propose improvement solution for the marketing strategy.
8. Remark	<p>This UoC is adopted from 107201L5. The UoC title is revised. The QF credit is adjusted from 12 to 6.</p>

Specification of Competency Standards for the Retail Industry
Units of Competency for 'Data Analytics'

1. Title	Analyse business data
2. Code	111396L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for data analytics in the retail industry. Practitioners have the ability to master the technology of business intelligence and analysis; use databases, data mining, online analysis and other techniques to analyse a large amount of commercial data obtained with critical mind to support business decision-making of the organisation.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the concept of business intelligence and analysis</p> <ul style="list-style-type: none"> ◆ Review the latest developments in databases, data mining, online analytics and other technologies to develop business data analysis policy ◆ Establish the objectives of business data analysis to collect the required data ◆ Use data science (e.g. set of mathematical, statistical and computer science analytical skills and techniques) to extract useful data ◆ Understand the application of business intelligence and analysis <p>6.2 Analyse business data</p> <ul style="list-style-type: none"> ◆ Use retail data and market information, data mining, online analysis, etc. to analyse and evaluate global, local and organisational operations data for the development trends in retail market for supporting appropriate business decision-making ◆ Analyse the nature and mode of operation of different social media platforms to help marketing activities (e.g. brand management, consumer behaviour and cost control) <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure the collection of data and processes complies with the requirements of privacy regulations ◆ Demonstrate the principles of law and business ethics, comply with the social responsibility and professional conduct in the implementation of business intelligence and analysis
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Understand the concept of business intelligence and analysis to develop business data analysis policy; and ◆ Apply business intelligence analysis to support business decisions such as decision-making systems.
8. Remark	This UoC is adopted from 107217L5

Units of Competency for 'Information Technology'

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Undertake general administrative work for accounts services
2. Code	111397L2
3. Range	This unit of competency (UoC) is applicable to staff responsible for product and service delivery to customers. Practitioners have the ability to provide account services for various service plans offered to different customer segments via product / service provision channels.
4. Level	2
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Possess the knowledge in the subject area</p> <ul style="list-style-type: none"> ◆ Understand the importance of fundamental services – including the general administrative work for customer accounts, to the overall success of the company’s CRM programme ◆ Understand the standard operation procedures and compliance requirements associated with different customer segmentation groups ◆ Understand the close relationship between the accurate and proper storage of customer information and the effective delivery of supporting administrative services ◆ Understand that even for fundamental administrative services, there can be significant differences in expectation and behaviour between different customer segmentations ◆ Be aware of the wide range of methods and practices in providing general supporting services, and their suitability in different circumstances <p>6.2 Undertake general administrative work for accounts services</p> <ul style="list-style-type: none"> ◆ Update customer accounts with the most current information in a periodic manner ◆ Perform periodic analysis of customer accounts of different segmentation groups ◆ Compel to a high level of control around sensitive data and processes from account opening to closing ◆ Undertake the accomplishment of customer account administration tasks in an efficient and timely manner ◆ Offer customers full range of administrative services for the opening and administration of account, and allow customers all types of services as permitted by relevant legislation ◆ Efficiently deal with customer inquiries, provide them with advices and recommendations with respect to different aspects of the company’s products and services ◆ Always treat the customer administrative work as an integral and essential part of the overall CRM programme <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Always ensure that all staff members are involved in customer administration and contribute their greatest effort in performing the daily supporting services ◆ Always treat the interests and requests of customers with the highest priority
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Maintain an effective and efficient general administrative services for customers in different segments; and ◆ Gain the appreciation of customers through administrative support as an element of CRM
8. Remark	This UoC is adopted from 100221L2

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Operate IT equipment / systems for retail business
2. Code	111398L2
3. Range	This unit of competency (UoC) is applicable to staff in retail stores or related working locations. Practitioners have the ability to use the IT equipment / systems and data input systems at the operation sites and carry out basic repair and maintenance under clear guidance according to the established working procedures of the organisation and the equipment manufacturer guidelines.
4. Level	2
5. Credit	3 (for reference only)
3 Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of IT equipment / systems for the retail industry</p> <ul style="list-style-type: none"> ◆ Possess knowledge of IT equipment / systems used by the organisation, including their functions, characteristics, support, correct operation, daily maintenance, etc. ◆ Understand corporate policies related to IT equipment / systems ◆ Understand the importance of using IT equipment / systems in accordance with the organisation’s established work procedures and equipment manufacturer’s guidelines, e.g.: <ul style="list-style-type: none"> • Sales invoice • Inventory records • Shop security • Avoid human errors • Reduce the cost of human resources ◆ Know the functions, support and characteristics of IT equipment / systems commonly used in the retail industry, e.g.: <ul style="list-style-type: none"> • POS terminal • Cashier register • Barcode scanner/card reader • Radio-frequency identification system (RFID) • Handheld data terminal ◆ Know the occupational safety and health ordinances and special requirements for using IT equipment / systems with special functions <p>6.2 Operate IT equipment / systems for retail business</p> <ul style="list-style-type: none"> ◆ Use relevant IT equipment / systems during daily routines according to the established policies of the organisation and the equipment manufacturer guidelines in order to finish the tasks assigned and complete the transactions, e.g.: <ul style="list-style-type: none"> • All kinds of hardware, including barcode scanner/card reader and RFID • Intranet and data transmission system • Backup of information • Data collection ◆ When a problem occurs in the IT equipment / system, locate the problem and perform simple repair according to the working guidelines to ensure normal business operation; immediately report to the higher level and seek technical support if the problem is serious ◆ Provide appropriate assistance to technical personnel during the repair of the IT equipment / system <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Adhere to the established procedures and guidelines of the organisation in order to use the IT equipment / systems correctly ◆ Abide by the professional conduct when processing data and prevent any improper conduct such as deleting or altering information ◆ Ensure that the IT equipment / systems used conform to relevant legal requirements

7 Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Correctly use various types of IT equipment / systems according to the established procedures of the organisation and the equipment manufacturer guidelines; and ◆ Perform simple repairs on IT equipment / systems according to the working guidelines; immediately report to the higher level and seek technical support from professionals if the problem is serious.
8 Remark	This UoC is adopted from 105088L2

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Retain online customers
2. Code	111399L2
3. Range	This unit of competency (UoC) is applicable to staff responsible for online business in the retail industry. Practitioners have the ability to apply appropriate online sales techniques and information technology under instruction according to corporate policy in order to maintain online customer relationship and improve online sales business.
4. Level	2
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the online customer knowledge</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s online business and sales strategies ◆ Know about the consumption pattern and behaviour of online customers and factors affecting these ◆ Know about the techniques of good customer relationship ◆ Understand the functions and features of all types of customer relationship network systems (e.g. customer relationship management system, email, website, online social media) ◆ Know about the considerations for customising online sales strategies, e.g.: <ul style="list-style-type: none"> • Online sales strategies of the organisation • Web sales system • Online sales procedures • Customer information system ◆ Know about the laws and regulations relevant to online business, including: <ul style="list-style-type: none"> • Personal Data (Privacy) Ordinance • Copyright Ordinance • Electronic Transactions Ordinance • Unsolicited Electronic Messages Ordinance • Computer Crimes Ordinance <p>6.2 Retain online customers</p> <ul style="list-style-type: none"> ◆ Implement customised online sales strategies and optimisation suggestions according to the organisation’s online business policy and the consumption pattern of online customers in order to ensure winning the target groups of customers, e.g.: <ul style="list-style-type: none"> • Design and structure of website • Publicity and promotion of products • Rules of pricing ◆ Apply network media and sales techniques under instruction to implement the corporate policy on online customer communication to build online customer relationship in order to maintain and retain online customers, e.g.: <ul style="list-style-type: none"> • Electronic newsletter • Email • Online forum • Social networking website • Online membership system • Loyalty programme • Electronic coupon ◆ Implement different online promotions (e.g. customer referral scheme, new membership scheme) according to the sales policy of the organisation in order to win/increase online customer groups <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Comply with the organisation’s policies and procedures when handling online customer information to avoid violating the Personal Data (Privacy) Ordinance, ensuring no tolerance for any form of cheating and malpractice

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Use customer data and information, network media and sales techniques under instruction to implement the established web sales policy of the organisation in order to maintain the online customer group; and ◆ Use different sales network technologies and media according to corporate guidelines to build online customer relationship and communication channels in order to win and retain online customers.
8. Remark	This UoC is adopted from 105090L2

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Conduct online sales
2. Code	111400L2
3. Range	This unit of competency (UoC) is applicable to staff responsible for online sales in the retail industry. Practitioners have the ability to conduct effective online sales in familiar and routine situations according to the established online sales procedures and product promotion strategies of the organisation in order to assist the organisation’s retail business development.
4. Level	2
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of online sales</p> <ul style="list-style-type: none"> ◆ Know about the organisation’s online business and sales strategies ◆ Understand the organisation’s online sales policy ◆ Possess knowledge of online sales ◆ Understand the organisation’s product sales terms and conditions ◆ Understand various types of online shop systems, including: <ul style="list-style-type: none"> • Product display and browsing • Online order • Online payment • Online publicity and promotion ◆ Know about the government regulations and legal requirements for online sales and websites ◆ Know about the corporate policy on online customer relationship <p>6.2 Conduct online sales</p> <ul style="list-style-type: none"> ◆ Use effective ways to conduct online sales according to the online business policy of the organisation ◆ Test the accuracy and effectiveness of the sales procedures/process according to the organisation’s guidelines: <ul style="list-style-type: none"> • The information of the order form is correct • The goods have been delivered punctually • The product has been well-packed • A thankyou letter is automatically sent by the system after the transaction is completed ◆ Use all kinds of web tools according to corporate guidelines to conduct product sales and promotion, e.g.: <ul style="list-style-type: none"> • Send online catalogues to target customers • Send emails to target customers • Use social network media (e.g. Facebook, Weibo) ◆ Assist in completing online transactions (e.g. confirm orders, issuing invoices, arrange deliveries) ◆ Implement the organisation’s online customer relationship policies and use customer care techniques to assist in retaining and attracting new customers <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Comply to the government regulations and legal requirements for online business activities, ensuring no tolerance for any form of cheating and malpractice
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Conduct online sales effectively according to the organisation’s online sales policy and procedures to assist the organisation’s retail business development; and ◆ Use all kinds of web sales techniques according to the established procedures of the organisation to assist the organisation in achieving its retail performance indicators.
8. Remark	This UoC is adopted from 105091L2

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Handle daily backup and maintenance of server
2. Code	111401L2
3. Range	This unit of competency (UoC) is applicable to staff responsible for handling maintenance of server. Practitioners have the ability to carry out daily backup and maintenance works of server according to the corporate requirements.
4. Level	2
5. Credit	3 (For reference only)
6. Competency	<p>6.1 Understand the knowledge of maintenance of server</p> <ul style="list-style-type: none"> ◆ Understand that data is the core of online marketing and hybrid marketing, it is very important for the server to properly run ◆ Understand that proper maintenance of server can enhance business continuity <p>6.2 Handle daily backup and maintenance of server</p> <ul style="list-style-type: none"> ◆ Recognise the server and the surrounding equipment and record the operation, such as the server room temperature, humidity and other data ◆ Identify backup devices and process daily backup jobs, such as the replacement of backup media and the delivery of media to the designated locations ◆ Review the progress and status of the backup work ◆ Prepare relevant reports <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure the server is working properly ◆ Careful handling of data in the report preparation
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Properly handle daily backup and maintenance work of server.
8. Remark	This UoC is adopted from 107226L2.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Handle customer profile and activity record
2. Code	111402L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for sales in the retail industry. Practitioners have the ability to handle and record customers’ sales records in daily activities and procedures, and correspondingly the related profit and loss calculation and data recording.
4. Level	3
5. Credit	4 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Possess the knowledge in the subject area</p> <ul style="list-style-type: none"> ◆ Understand the importance of the timely and accurate recording of sales data in every step of the sales cycle ◆ Understand the necessity in collecting all relevant information such as information related to customers, products, transactions, etc ◆ Understand the need of a unique level of integrated and accurate treatment while managing customer profit and sales records across all customer segmentations ◆ Understand the standard procedures of tracking systems so that the system can be operated independently ◆ Understand that the handling of customer profit and sales records must comply with the requirements of the company’s internal tracking mechanism ◆ Be aware of the close relationship between the company’s CRM strategies and customer records handling activities <p>6.2 Handle customer profile and activity record</p> <ul style="list-style-type: none"> ◆ Maintain and update the data to ensure its accuracy and integrity, utilising computer systems and application packages whenever applicable ◆ Detect the irregularities or missing data and seek information from appropriate sources to supplement the insufficiency ◆ Generate reports to provide visibility on sales activities and monitor sales results ◆ Provide relevant statistics and conduct analysis related to sales cycle management upon request ◆ Document the records and information regarding customer sales and profit accurately, probably with the use of computerised database management software <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Always ensure all related staff members contribute their greatest effort honestly while handling customer sales and profit records ◆ Always maintain the proper balance of interests between customers and the company as a whole ◆ Always process customer data with a scientific and objective approach
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Successfully provide accurate and timely reports on sales data ◆ Fulfil the information requirements as requested by different stakeholders ◆ Permanently record the relevant information and make available for future queries or updates upon request
8. Remark	This UoC is adopted from 100223L3. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Repair IT equipment / systems
2. Code	111403L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for IT equipment / systems in the retail industry. Practitioners have the ability to inspect and repair IT equipment / systems in operation sites regularly according to the established procedures of the organisation, and conduct instant check and repair when an emergency occurs in order to ensure normal operation of the organisation.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of IT equipment / systems</p> <ul style="list-style-type: none"> ◆ Know about the functions and features of the IT equipment / systems of the organisation ◆ Possess basic knowledge of IT equipment / system repair, including: <ul style="list-style-type: none"> • Functions, structure and operation mode of the IT equipment / systems • Operation setting and interface of the IT equipment / systems • Operating standards, equipment configuration, system support recommended by the manufacturer • User guide or diagram of IT equipment / systems • Appropriate repair tools and equipment ◆ Understand repair techniques for all kinds of IT equipment / systems ◆ Understand the troubleshooting devices and systems for IT equipment / systems <p>6.2 Repair IT equipment / systems</p> <ul style="list-style-type: none"> ◆ Confirm with the higher level on details of repairs according to the established procedures of the organisation, and devise simple repair plans for complex repairs ◆ Arrange repairs with staff of retail stores within the pre-set time limit according to corporate procedures ◆ Conduct repairs according to corporate working guidelines and user manual, e.g.: <ul style="list-style-type: none"> • Keep record or backup of the equipment / system applications • Inspect the IT equipment / systems according to the manufacturer’s operating guidelines • Repair simple equipment / system problems, and seek help from the higher level or relevant experts when encountering complex problems • Recover and re-install equipment / system configuration and operation setting • Test the equipment / systems to ensure that the operation conforms to the operating specifications of the manufacturer ◆ Accurately record and file the repair items for future reference <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Conduct repairs to ensure compliance with the manufacturer’s and international standards ◆ Follow the corporate guidelines to recover the equipment / systems within the pre-set time limit
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Conduct basic setup, installation, configuration, troubleshooting and inspection to IT equipment / systems in operation sites according to the code of practice of the organisation to ensure normal operation of the equipment / systems that conforms to the operational needs of the organisation and the operating specifications of the manufacturer.
8. Remark	This UoC is adopted from 105092L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Manage online brands
2. Code	111404L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for website operation in the retail industry. Practitioners have the ability to effectively manage the organisation’s online brand products in accordance with the established goals of the organisation in order to retain existing customers, attract new customer source and explore potential customers.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of online brands</p> <ul style="list-style-type: none"> ◆ Master the established online sales strategies of the organisation ◆ Understand details of the organisation’s online business platform and its operation procedures ◆ Master different forms of brands owned by the organisation (e.g. product brands, corporate brands, brands of suppliers, registered trademarks, registered brands, intellectual properties) ◆ Understand characteristics of online operation (e.g. construction of website, online domain and domain name, search engine) ◆ Understand general brand management strategies, e.g.: <ul style="list-style-type: none"> • Customer retention programmes and promotional activities • Loyalty and retention programmes • Resources plan • Sales strategies • Pricing strategies • Publicity and distribution strategies • Relationship between web search and access • Assessment of competitors’ activities, etc. ◆ Understand the regulation of online business activities by government ordinances <p>6.2 Manage online brands</p> <ul style="list-style-type: none"> ◆ Manage the organisation’s online brand products according to the organisation’s goals and strategies, e.g.: <ul style="list-style-type: none"> • Assess the actual value of the brand products • Determine the way of promoting the brand products online • Judge online customers’ attitude towards the brands • Judge the comparative advantages of the organisation’s online brand products and those of its competitors • Assess what effect will bring on the brand products in an online environment and channel • Determine what additional area can make the brand products stand out in an online environment • Establish indicators for measuring brand value and sales performance ◆ Implement measures to optimise the value of online brand products, e.g.: <ul style="list-style-type: none"> • Collect information about online customer behaviour and product loyalty • Combine brand management as well as sales and promotional activities • Establish the legal status of ownership of brand products in an online environment • Ensure the intellectual properties related to the brand products are protected in an online environment

	<ul style="list-style-type: none"> • Deploy and implement other measures to optimise online brands, e.g.: <ul style="list-style-type: none"> ○ Special prices ○ Exclusive supply ○ Extensive choices ○ Special function (only applicable online) ○ Early exposure (fashion or trendy products) ○ Logistics support (direct delivery) ○ Personal reward, etc. ◆ Regularly review online brand product management, and give improvement suggestions to the higher level <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Adhere to government ordinances that monitor and regulate online business, ensuring no tolerance for any form of cheating and malpractice
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Manage the organisation's online brand products according to the established goals of the organisation; and ◆ Align with the organisation's retail business development by online brand product management.
8. Remark	This UoC is adopted from 105093L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Manage online shopping
2. Code	111405L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for website operation in the retail industry. Practitioners have the ability to apply retail management and computer network knowledge to manage the organisation’s online shopping system according to the established online shopping management policy of the organisation to ensure that the existing system functions, operational procedures, etc. conform to the organisation’s business policies and user needs.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of online shopping</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s online purchasing strategy and policy ◆ Understand the structure of the organisation’s online commerce system, e.g.: <ul style="list-style-type: none"> • Online payment system • Settlement and currency systems • Online order system • Understand the structure and operation mode of online purchasing system (e.g. product catalogue, e-tendering, e-transaction, shipping solutions) ◆ Understand the organisation’s information technology security guidelines and measures (e.g. digital certificates, encryption techniques) ◆ Understand potential security risks for online purchase and the contingency measures ◆ Understand the regulations on e-commerce and website as stipulated by the government’s ordinances <p>6.2 Manage online shopping</p> <ul style="list-style-type: none"> ◆ Negotiate with relevant departments on the requirements for product purchase (including online shopping) ◆ Assess and assist in choosing an online shopping management model that meets the organisation’s technological and cost requirements ◆ Assess the online shopping method and procedures, e.g.: <ul style="list-style-type: none"> • Way of purchase application between departments and stores • Purchasing procedures (e.g. approval of purchase requests, issuance of purchase orders, liaison with suppliers) • Follow the progress of purchase • Supplier’s latest information (e.g. product, price, shipping period) ◆ Perform daily online shopping management duties according to the established online shopping plan and procedures of the organisation, e.g.: <ul style="list-style-type: none"> • Internal order request • Adjust and approve purchase order • Monitor the purchasing status • Gather user feedback • Monitor system functions to see whether they are accurate and adequate • Review the shopping process and procedures to see whether they are effective and easy to use • Monitor the security, backup and recovery functions of system ◆ Provide training for users/relevant staff on the use of online shopping system ◆ Carry out necessary system update to ensure that the chosen shopping system meets the organisation’s requirements and business policy <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Take into account the benefit of customers, the organisation and other stakeholders when managing online shopping ◆ Comply with the government’s regulations and legal requirements for online business activities

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Apply retail management and computer network knowledge to manage the organisation's online shopping system according to the organisation's established purchasing management policy; and ◆ Manage online shopping in order to align with the overall retail business development.
8. Remark	This UoC is adopted from 105096L3

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Manage online inventory
2. Code	111406L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for website operation in the retail industry. Practitioners have the ability to use retail inventory management and computer network knowledge according to the established inventory management policies of the organisation to manage its online inventory in order to align with the overall retail business development.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of online inventory</p> <ul style="list-style-type: none"> ◆ Master basic knowledge of inventory management, e.g.: <ul style="list-style-type: none"> • Corporate strategies and procedures for handling inventory • Inventory location and planning of the organisation • General inventory management and warehousing • Use and control of relevant inventory system software ◆ Understand additional knowledge and techniques for managing online inventory, e.g.: <ul style="list-style-type: none"> • E-commerce and relevant terms • Online inventory management models commonly used, e.g.: <ul style="list-style-type: none"> ○ Traditional inventory model ○ E-commerce model ○ Vendor managed inventory (VMI) ○ Customer managed inventory (CMI) ○ Drop Shipping • Virtual warehousing • Electronic data interchange (EDI) • Computing and network operation techniques ◆ Understand the regulation on e-commerce and website as stipulated by the government’s ordinances <p>6.2 Manage online inventory</p> <ul style="list-style-type: none"> ◆ Negotiate with relevant staff on inventory (including online inventory) requirements ◆ Compare the advantages and disadvantages of different online inventory management models as well as their applicability to the organisation’s retail business ◆ Assess the available online inventory management models and their cost and technological requirements ◆ Establish the online inventory management model finally selected finally adopted in accordance with the organisation’s established inventory management policy ◆ Carry out daily online inventory management duties, e.g.: <ul style="list-style-type: none"> • Monitor online inventory data • Check and update the online inventory catalogue continuously to minimise missed sales opportunities caused by out-of-stocks, while streamlining the replenishment and transfer processes for enhanced efficiency • Monitor and handle the orders of goods and futures: <ul style="list-style-type: none"> ○ Fulfil the order requirements ○ Confirm delivery time ○ Handle emergency situations • Re-order with online automation according to the pre-set inventory quantity • Consider factors affecting the consumption of goods, e.g. sales promotion, season, price, etc. • Carry out electronic data interchange (EDI) with relevant units (e.g. Hong Kong Customs and Excise Department, Trade and Industry Department) according to the security procedures of the selected online inventory management model • Ensure that ordinances, regulations and rules related to e-commerce are executed, e.g.: <ul style="list-style-type: none"> ○ Copyright Ordinance ○ Personal Data (Privacy) Ordinance ◆ Monitor the performance of contractor if the online inventory management is outsourced

	<p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Monitor online inventory in accordance with the organisation's inventory management policies ◆ Ensure that the benefit of customers, the organisation and other stakeholders has been taken into account during online inventory management, ensuring no tolerance for any form of cheating and malpractice
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Apply retail inventory management and computer network knowledge to monitor the organisation's online inventory according to its inventory management policies; and ◆ Monitor the organisation's online inventory using an online inventory management approach, with the aim of minimising missed sales opportunities caused by out-of-stock items, while streamlining the replenishment and transfer processes to enhance overall efficiency.
8. Remark	This UoC is adopted from 105097L3

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Manage and monitor the webpage server
2. Code	111407L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for server maintenance in the retail industry. Practitioners have the ability to provide immediate and comprehensive monitoring and solutions for possible server problems.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of monitoring mainstream web servers</p> <ul style="list-style-type: none"> ◆ Understand the management settings of the mainstream web server (e.g. Apache, IIS) ◆ Assist in setting up web server monitoring and alerts, such as automated monitoring and unified monitoring, and pushing alert messages with different channels to the authorised persons ◆ Understand the Simple Network Management Protocol (SNMP) for setup and use webpage server ◆ Assist in providing server performance data ◆ Provide critical usability and performance data, analyse web server processing requests, network traffic, etc. ◆ Monitor the status and performance of web pages or websites ◆ In addition to monitoring the availability and operation of web servers, monitor the status and performance of individual website (e.g. Page Load Time) ◆ Prepare report forms and reports, and export them to various documentation ◆ Analyse the server’s problems, causes of the problems and repair methods (e.g. insert a flash drive into the server, and then start the server into repair mode) <p>6.2 Manage and monitor the webpage server</p> <ul style="list-style-type: none"> ◆ Meet the needs of customer website management and monitoring <ul style="list-style-type: none"> • Master the relevant server management technology and collect performance data to prevent the occurrence of the problems • Provide information on the operation of the server to relevant personnel to make more detailed analysis <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure the operability, efficiency, reliability and manageability of the server
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Understand the basic principles and settings of web server software management and monitoring; and ◆ Master the main features of management for webserver software and ensure its operability, efficiency, reliability and manageability.
8. Remark	This UoC is adopted from 107227L3.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Incorporate and fine-tune the proposals by other organisations such as outsourcing party
2. Code	111408L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for information technology support in the retail industry. Practitioners have the ability to consider various actions to incorporate and refine those CRM proposals submitted by partnering organisations such as third party outsourcers.
4. Level	4
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Possess the knowledge in the subject area</p> <ul style="list-style-type: none"> ◆ Be aware of the situation that benefits of making use of the services of outside organisations at different stages of providing ICT products, including the initial step of CRM strategies formulation ◆ Understand the importance of tight coordination with and close monitoring over outsourcers in order to bring maximum benefits and Return on Investment (ROI) to the company ◆ Grasp the necessity in establishing a comprehensive set of criteria for choosing partners in outsourcing ◆ Be aware of the significance in ensuring consistency of outsourcing partners’ attitude towards own company objectives ◆ Be aware of the necessity in managing third party staff as company’s own staff members <p>6.2 Incorporate and fine-tune the proposals by other organisations such as outsourcing party</p> <ul style="list-style-type: none"> ◆ Setup appropriate and feasible guidelines / standards in choosing partners for the company’s outsourced tasks ◆ Ensure the established standards and guidelines are interfacing with outsourcers at different stages, such as the initial formulation of CRM strategies ◆ Disseminate the established outsourcer standards to all levels of own staff members and ensure that they will stick to them when dealing with outsourcing parties ◆ Liaise and communicate closely and regularly with outsourcers to obtain their latest progress and ideas in a timely manner ◆ Skilfully / tactfully demand outsourcers to submit their own CRM strategies such that their effectiveness can be evaluated and more importantly the compatibility with own company ◆ Integrate outsourcers’ work in CRM strategies with own company to ensure maximum results from the combined efforts ◆ Establish clear and unambiguous performance indicators for outsourcers and exercise those reward or penalty procedures accordingly <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Always work with full capacity and ability in the process of handling outsourcers’ CRM strategic proposals to ensure long-term stability and usability ◆ Always strike a proper balance of the interests between outsourcers and own company
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Successfully acquire those useful CRM strategies proposals from outsourcers; ◆ Successfully integrate the CRM strategies of outsourcers and those of own company to realise the combined benefits; and ◆ Ensure the adoption and implementation of the combined CRM strategies at subsequent stages
8. Remark	This UoC comes from the Information & Communications Technology Industry. It is adopted from 100228L4. The UoC title is revised.

Specification of Competency Standards for the Retail Industry
Units of Competency for 'Information Technology'

1. Title	Deliver the database operations services
2. Code	111409L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for database maintenance in the retail industry. Practitioners have the ability to operate and administer the database according to work instructions, procedures and service requests in the context of providing database operations services for an organisation or for a client.
4. Level	4
5. Credit	14 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the work instructions, procedures and service requests for the operation and administration of databases and be able to:</p> <ul style="list-style-type: none"> ◆ Comprehend the instructions, procedures and service requests specified for the operation and administration of databases ◆ Understand the performance requirements set out in the service level agreement, if any, of the organisation ◆ Seek clarification from relevant people where necessary <p>6.2 Deliver the database operations services</p> <ul style="list-style-type: none"> ◆ Follow the work instructions and procedures in the operation and administration of databases, and in fulfilling service requests to <ul style="list-style-type: none"> • Carry out the database's operating and administrative activities in accordance to the work instructions and procedures specified • Carry out the activities necessary to fulfil service requests in accordance to the specified work instructions and procedures specified • Operate, monitor and provide system statistics on database availability and performance • Report to supervisors of any problems and exceptional situations during the execution of these activities <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Carry out the database operating and administrative activities in the most effective and efficient manner, meeting or exceeding the service level agreement, if any, of the organisation ◆ Fulfil the service requests in the most effective and efficient manner ◆ Report problems and exceptional situations
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Provide database operational and administrative services with pre-defined procedures and automated systems to enable operations of the database environment as per service level agreement (SLA) requirements; and ◆ Fulfil service requests of the database to the satisfaction of the requestors.
8. Remark	This UoC is adopted from 100536L4

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Manage online sales system
2. Code	111410L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for online sales services. Practitioners have the ability to use various types of information technology application software to support and enhance work efficiency; manage the organisation’s online sales system according to its online sales policy and the environmental needs; conduct regular monitoring and review to ensure the accuracy and timeliness of the sales system.
4. Level	4
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of online sales service system</p> <ul style="list-style-type: none"> ◆ Understand the online sales policy and strategies of the organisation ◆ Understand the functions, features, configuration, strengths and weakness, etc. of the organisation’s online sales system ◆ Understand important settings for online sales systems, e.g.: <ul style="list-style-type: none"> • Customer group, supply chain • Online promotion • Online commodity catalogue • Online order and payment • Network security system ◆ Know about the backup required, essentials for business continuity and potential risks of online sales system ◆ Understand legal requirements for online sales, e.g.: <ul style="list-style-type: none"> • Personal data (Privacy) Ordinance • Copyright Ordinance • Unsolicited Electronic Messages Ordinance • Electronic Transactions Ordinance • Information security ◆ Understand information technology project management theories and techniques <p>6.2 Manage online sales system</p> <ul style="list-style-type: none"> ◆ Choose an appropriate online sales system and set an accurate financial budget (including the budget of software and hardware, publicity and training) according to the organisation’s online sales strategies and the needs of business environment, and introduce an advanced online sales system ◆ Formulate and implement appropriate customer transaction and payment procedures according to the organisation’s online sales strategies and relevant legal requirements ◆ Clearly define the sign-in permissions and interface of the network system for customers, suppliers and sellers to strengthen system security ◆ Formulate online sales security policy and procedures according to relevant legal requirements and the organisation’s sales strategies in order to protect against malicious software, phishing attacks, adware, etc. ◆ Maintain various types of electronic transaction records accurately, including email, voice mail, chat room, etc. ◆ Formulate the organisation’s online sales system monitoring and repair procedures to regularly monitor the system status, details of the sales items, online promotions, etc.; perform recovery and update tasks accordingly to ensure the accuracy and timeliness of the content and pricing in the system ◆ Regularly review the online sales system to ensure that it meets the operational needs of the organisation <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Comply with the legal requirements related to online sales and avoid abusing e-commerce platforms for false / illegal conduct

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Develop online sales security policies and procedures as well as the organisation's online sales system monitoring and maintenance procedures according to the organisation's online sales strategies and system features; and ◆ Regularly monitor, review and update sales system information to ensure the accuracy and timeliness of the web content (sales items, price marking, etc.).
8. Remark	This UoC is adopted from 105094L3. The QF level is adjusted from Level 3 to Level 4.

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Set up IT equipment needed for retail operations
2. Code	111411L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for IT support in the retail industry. Practitioners have the ability to identify the IT equipment needed for day-to-day retail store operations, and seek the management’s approval to acquire relevant equipment in order assist the business development.
4. Level	4
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of IT equipment</p> <ul style="list-style-type: none"> ◆ Understand the operation strategies and business development plan of the organisation ◆ Understand the IT infrastructure and supporting facilities of the online and offline retail stores ◆ Master the business scope, objectives, direction and development plan of the retail stores (e.g. flagship store, specialty store, branch) ◆ Understand the types, technology and functions of IT equipment for day-to-day retail store operations, e.g.: <ul style="list-style-type: none"> • Point of sale (POS) (e.g. invoice, settlement, inventory) • Digital display • Internet and network (e.g. broadband, website and wireless access point) • Security system (e.g. RFID reader, CCTV, IP camera) ◆ Understand common types of hardware and software in the retail industry and their characteristics and functions ◆ Know about corporate procedures for submitting proposals ◆ Know about IT project management techniques <p>6.2 Set up IT equipment needed for retail operations</p> <ul style="list-style-type: none"> ◆ Identify IT equipment needed for day-to-day retail operations according to factors such as business scope, objectives, etc. of the retail stores, including: <ul style="list-style-type: none"> • Type and quality of equipment • System functions and coverage • Deployment schedule • Financial budget • End user / department ◆ Assess the factors affecting the existing retail operation equipment, e.g.: <ul style="list-style-type: none"> • New technology development • Implementation of relevant ordinances and codes • Business development plan ◆ Analyse and formulate proposals and implementation plans for the improvement of retail operation equipment, timely and accurately reflect them to the management and seek for approval to implement the improvement plan <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the proposed retail operation equipment meet the actual needs of retail stores and the organisation ◆ Ensure that the IT equipment used comply with the legal requirements e.g. the Copyright Ordinance
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Accurately analyse and assess the functions, types, systems, etc. of the retail operation equipment needed for day-to-day operations according to the business scope and policies of the respective online or offline retail stores; and ◆ Formulate comprehensive proposals and implementation plans for the improvement of retail operation equipment and reflect them to the management in order to assist the organisation to development its business.
8. Remark	This UoC is adopted from 105099L4

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Deploy information technology equipment / systems for retail operations
2. Code	111412L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for information technology support in the retail industry. Practitioners have the ability to formulate plans for the deployment, installation, disposition and testing of information technology equipment / systems at the operation sites in accordance with the organisation’s operation strategies and needs in order to enhance work efficiency and promote business.
4. Level	4
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of deploying information technology equipment / systems</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s policies, procedures and requirements for deploying information technology equipment / systems for retail operations ◆ Understand the purpose and importance of formulating a perfect plan for the deployment of information technology equipment / systems for retail operations ◆ Understand the necessary procedures of installing information technology equipment / systems, including: <ul style="list-style-type: none"> • Pre-test • Installation of equipment • System settings • Testing facilities/systems ◆ Master various kinds of methods and skills for testing information technology equipment / systems ◆ Master different causes of failure of information technology equipment / systems and trouble-shooting skills ◆ Understand methods of managing information technology projects ◆ Understand the importance of communication skills (technicians and users) and quality service to perfect the installation plan of information technology equipment / systems <p>6.2 Deploy information technology equipment / systems for retail operations</p> <ul style="list-style-type: none"> ◆ Explain details of the deployment of information technology equipment / systems to the responsible person and related workers at the operation site, including: <ul style="list-style-type: none"> • Types of information technology equipment / systems, their functions and characteristics • Location of installation • Work schedule • Corresponding actions to be taken by business units ◆ Formulate the detailed plan and procedures for the deployment of information technology equipment / systems according to the organisation’s operation strategies and needs, e.g.: <ul style="list-style-type: none"> • Selecting appropriate facilities/systems • Points to note in purchasing facilities/systems • Installation priorities • Disposition details • Testing plans ◆ Accurately assess and purchase information technology equipment / systems that fulfil the organisation’s operation needs, of high stability, and are easy to operate in order to ensure a normal business operation ◆ Correctly install information technology equipment / systems and the required operation settings according to manufacturers’ installation guidelines ◆ Perform testing after completion of installation, including: <ul style="list-style-type: none"> • Testing the functions of related facilities/systems to ensure that they fulfil the actual operation needs • Performing an integration test to ensure that the operation of related facilities/systems will not have serious effect on other facilities/systems • Performing a multi-point connection test to ensure accurate and correct network connection and data transmission ◆ Provide timely training for various workers at the operation sites after completion of installation, and let them master the correct operation methods and procedures by means of good

	<p>communication skills</p> <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the facilities/systems purchased conform to international standard and fulfil the business needs of the organisation ◆ Install information technology equipment / systems in accordance with the established procedures ◆ Ensure that the related facilities/systems fulfil the actual requirements of the operating unit and regularly provide them with the latest information
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Formulate a detailed plan and work flow for the deployment of information technology equipment / systems to ensure that the related facilities/systems can be installed according to schedule without affecting the daily operation; and ◆ Correctly install, set up and test related information technology equipment / systems in accordance with the established operation standard of the organisation and manufacturer.
8. Remark	This UoC is adopted from 105100L4

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Use mobile technologies to improve sales service
2. Code	111413L4
3. Range	This unit of competency (UoC) is applicable to IT staff in the retail industry. Practitioners have the ability to use mobile technologies to improve sales service according to the organisation’s sales, including online sales, strategies in order to assist the development of its overall retail business.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of mobile sales technologies</p> <ul style="list-style-type: none"> ◆ Master the organisation’s overall sales (including online and offline sales) strategies ◆ Understand the details of mobile technologies currently available for commercial use ◆ Understand the potential advantages of mobile technologies for the organisation’s retail business, including: <ul style="list-style-type: none"> • Increase of sales • Contact with new sources and groups of customers • Enhancing the organisation’s reputation • Strengthening the IT application in the organisation ◆ Understand the extra costs of mobile technologies that the organisation may have to bear in its retail business and the relevant regulations, e.g.: <ul style="list-style-type: none"> • Extra manpower demand • Extra technical training required • Processes or work items required to be outsourced • Internal information tends to leak more easily • Ordinances for the regulation of mobile technologies ◆ Understand how mobile technologies support the existing sales mechanism of the organisation <p>6.2 Use mobile technologies to improve sales service</p> <ul style="list-style-type: none"> ◆ Consider and compare different retail sales channels, including: <ul style="list-style-type: none"> • Traditional store • Product catalogue • Call centre • Internet • Mobile technologies such as smart phone ◆ Introduce retail business mobile technologies/solutions that suit the organisation most ◆ Make full use of the mobile technologies to promote the organisation’s retail business, e.g.: <ul style="list-style-type: none"> • High penetration • Extensive mobile network ◆ Improve transparency in commodity prices <ul style="list-style-type: none"> • Keep close to other social network platforms • Attract young consumer group • Enhance customers’ loyalty to corporate brand ◆ Assess the effects of mobile technologies on the organisation’s retail business (e.g. increase in sales, extra costs) <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Comply with relevant ordinances and regulations on the use of mobile technologies ◆ Prevent corrupt conduct by means of mobile technologies
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Use mobile technologies to improve sales service according to the established online sales strategies of the organisation; and ◆ Use mobile sales technologies to assist the organisation’s overall retail business development.
8. Remark	This UoC is adopted from 105101L4

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Implement e-retail business model
2. Code	111414L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for policy implementation in the retail industry. Practitioners have the ability to implement e-retail business model according to the established policies of the organisation, and ensure its smooth operation in order to align with the organisation’s retail business development.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of electronisation of retail business</p> <ul style="list-style-type: none"> ◆ Master the organisation’s e-sales strategies and relevant resources ◆ Understand the details and operational procedures of the e-business model selected by the organisation, e.g.: <ul style="list-style-type: none"> • Model type (e.g. business to business (B2B) or business to customer (B2C)) • Customer group faced • Infrastructure and application software used • Products and services promoted • Content and information provided • Payment method used ◆ Understand the indicative factors of success for implementation of e-retail business model, e.g.: <ul style="list-style-type: none"> • Earnings and relevant maintenance fees • Relationship with customers • Business management performance • Relationship with partners • Efficiency of data processing • Coordination/cooperation with stakeholders ◆ Understand the regulation on e-business model and website as stipulated in the government’s ordinances <p>6.2 Implement e-retail business model</p> <ul style="list-style-type: none"> ◆ Implement related tasks according to the established e-retail business model of the organisation: <ul style="list-style-type: none"> • One-off tasks e.g.: <ul style="list-style-type: none"> ○ Build a platform for the organisation’s online retail business ○ Deploy staff member of the organisation or outsource the job to support e-retail operation ○ Buy / rent the software and hardware required ○ Check out the ordinances, ethics and security matters necessary for website business ○ Procedures for handling and following up customer complaints • Periodic tasks e.g.: <ul style="list-style-type: none"> ○ Monitor day-to-day online retail business operation ○ Measure and record the indicative factors for the above e-retail business model ○ Ensure that all online retail businesses are handled in a normal way ○ Ensure that all emergencies/unusual situations / complaints are promptly handled ○ Make improvement when necessary in order to handle users’ requests • Develop and update relevant computer software and hardware when necessary ◆ Review the organisation’s e-retail business model regularly and suggest improvements to the higher level <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Take into account the benefit of the organisation, the customers and all other stakeholders during the implementation of e-retail business model ◆ Prevent any abuse of power or corrupt conduct by abusing the e-retail business model of the organisation

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Implement the established e-retail business model of the organisation; and ◆ Ensure smooth operations to develop the organisation's retail business by implementing the e-retail business model.
8. Remark	This UoC is adopted from 105102L4

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Manage online commercial risks
2. Code	111415L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for policy formulation in the retail industry. Practitioners have the ability to promptly and accurately perceive and properly handled the risks occurred in the organisation’s online commerce, in order to assist its retail business development.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of online commercial risks</p> <ul style="list-style-type: none"> ◆ Understand the functions and operational procedures of the organisation’s online business platform ◆ Understand the causes of online commercial risks, e.g.: <ul style="list-style-type: none"> • Wrong targets • Technical failures • Security vulnerabilities • Occurrences of fraud ◆ Understand all kinds of online commercial risks, e.g.: <ul style="list-style-type: none"> • Legal risks in conducting global trades • Risks of contract breach for local and international trades due to the failure in complying with the requirements • Internal risks in conducting e-transactions • Risks caused by customers when conducting e- transactions • Risks caused by computer software or hardware failures • Risks caused by vulnerabilities/invasion of the security system ◆ Understand the protection and loopholes of various kinds of authentication ◆ Understand the regulations on e-commerce and website as stipulated by the government’s ordinances <p>6.2 Manage online commercial risks</p> <ul style="list-style-type: none"> ◆ Assess the chance of the occurrence of online commercial risks and its impact on the business and even the overall image of the organisation ◆ Operate according to the formulated risk management strategies, e.g.: <ul style="list-style-type: none"> • Consult relevant personnel to prevent or minimise legal risks and online frauds • Ensure the implementation of risk management procedures by relevant personnel, e.g.: <ul style="list-style-type: none"> ○ Procedures and methods for detecting commercial risks ○ Ways of handling general risks ○ Contingency plan for emergencies ○ Keep record of the risk cases handled and carry out other procedures to follow up ◆ Review online commercial risk management, e.g.: <ul style="list-style-type: none"> • Improve the risk management plan in response of the incidents causing damage to the organisation • Review the effectiveness of the existing online fraud control measures and make suggestions to improve the result • Gather feedback from personnel responsible for online commercial risk management and from customers; review and improve the risk management strategies accordingly ◆ Make periodic summaries on the review of online commercial risk management, and make improvement suggestions <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Follow the established risk management strategies of the organisation during the management of online commercial risks ◆ Protect the benefit of the organisation and the customers during the management of online commercial risks

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Perceive and handle the risks occurred in the organisation's online commerce; and ◆ Manage the organisation's online commercial risks in order to align with its retail business development.
8. Remark	This UoC is adopted from 105103L4

Specification of Competency Standards for the Retail Industry
Units of Competency for 'Information Technology'

1. Title	Master mobile payment services
2. Code	111416L4
3. Range	This unit of competency (UoC) is applicable to staff responsible for online sales in the retail industry. Practitioners have the ability to apply mobile payment services in the process of website design and development.
4. Level	4
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand mobile payment services</p> <ul style="list-style-type: none"> ◆ Understand the basic concepts of mobile payment services, e.g. <ul style="list-style-type: none"> • Personal to personal (P2P) and person to merchant (P2M) • Customers could make use of mobile phone payment services, digital and physical entities without the use of cash, checks or credit cards ◆ Understand the types, characteristics, and modes of operation of mobile payment services, e.g. <ul style="list-style-type: none"> • SMS-based transfer payments • mobile bill payments • mobile network payment (WAP) • contactless payment (NFC) • mobile service operators to work with banks ◆ Understand the relevant laws (e.g. the Payment System and Stored Payments Ordinance, the Banking Ordinance) <p>6.2 Master mobile payment services</p> <ul style="list-style-type: none"> ◆ Financial institutions and credit card companies (e.g. JETCO Pay, O!ePay) ◆ Internet service companies (e.g. Alipay) ◆ Mobile communications service operators and communications network infrastructure (e.g. Tap & Go) ◆ Manufacturers of mobile devices (e.g. Apple Pay) <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the development of mobile payment services technology complies with industry or international standards ◆ Ensure the integration and security of mobile payment service
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Explain the overview of mobile payment services; and ◆ Apply mobile payment solutions provided by different companies
8. Remark	This UoC is adopted from 107215L4

Specification of Competency Standards for the Retail Industry
Units of Competency for 'Information Technology'

1. Title	Monitor and control the project cost
2. Code	111417L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for information technology support in the retail industry. Practitioners have the ability to monitor and control the project cost, and update the project cost accordingly so that a project can be completed within an approved budget.
4. Level	5
5. Credit	2 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Have knowledge in cost monitoring process</p> <ul style="list-style-type: none"> ◆ Be able to design an effective cost monitoring system for checking against planned resources as well as setting up appropriate monitoring checkpoints <p>6.2 Monitor and control the project cost</p> <ul style="list-style-type: none"> ◆ Measure cost deviation <ul style="list-style-type: none"> ● Measure, monitor and control the cost incurred regarding product development, quality control and deadlines fulfilment ● Alert top management authority at the appropriate time when the cost incurred exceeding its tolerant limit ● Evaluate remedial action on cost change when necessary <ul style="list-style-type: none"> ○ Identify and evaluate the factors of cost ○ Revise cost estimates ○ Evaluate the impact to the cost baseline <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Define a cost change control system ◆ Ensure staff adhere to the cost change procedures ◆ Integrate approved cost changes with other project control mechanisms
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Make an effective monitoring of the cost incurred during the project development; ◆ Take a proper control on the expenses involved in the project; and ◆ Maintain the implementation of the standard cost change procedure as well as to incorporate the change with all other related control systems.
8. Remark	This UoC is adopted from 100336L5

Specification of Competency Standards for the Retail Industry
Units of Competency for 'Information Technology'

1. Title	Establish and maintain system support services process
2. Code	111418L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for information technology support in the retail industry. Practitioners have the ability to define, design, establish, develop and review the system support services process on servicing items related to system support services, and provide support resources with appropriate skills for servicing the related items in the context of providing system support services for an organisation.
4. Level	5
5. Credit	8 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Have good technical knowledge of the system support services of the industry</p> <ul style="list-style-type: none"> ◆ Understand the support activities in system support services functions ◆ Communicate the impacts of system support services functions to other technical support team members ◆ Know the major activities in system support services and the resources required ◆ Outline the major activities in system support services ◆ Identify the resources required in each of these major activities in system support services <p>6.2 Establish and maintain system support services process</p> <ul style="list-style-type: none"> ◆ Define, design and develop the process for system support services ◆ Define, design and develop the process for servicing items related to system support services with technical advice based on operations and infrastructure knowledge ◆ Review the process for system support services ◆ Analyse the defined system support services process for its effectiveness and efficiency at regular intervals ◆ Identify key factors that are crucial to the effectiveness and efficiency of the defined system support services process ◆ Review the defined system support services and recommend new process for future improvements, if necessary ◆ Provide support resources with appropriate skills for the provision of system support services ◆ Be able to identify and allocate the with appropriate skills for the resources required (including the appropriate skills) in each of these major activities in the defined system support services process according to the organisation's guidelines <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Define, design, establish, develop and review the system support services process of an organisation based on industry best practices and standards as well as local and international standards, and ◆ Comply with organisation's guidelines as well as any (local and international) laws and regulatory requirements\
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Establish effective and efficient system support services process to satisfy the evolving demands of the business in a timely manner; ◆ Review, evaluate and improve the system support services process based on recommendations made during previous executions of the process; and ◆ Provide sufficient resources with appropriate skills in the provision of system support services.

8. Remark	<p>Examples of items related to server support services include, but are not limited to, the following:</p> <ul style="list-style-type: none"> ◆ Software and hardware components (e.g. server, network, voice, and video); ◆ Configuration items for version control via an application asset management (e.g. application related documents (e.g. system / design / programme specifications, codes and operation documentations)); and ◆ Items related to system management services such as the following: <ul style="list-style-type: none"> • System Monitoring and tuning; • Service level measurement and reporting; • Software packaging and software distribution; • Configuration Management; • User administration and access control; • Directory services support; • Storage allocation and access control; • Data backup and recovery; • Remote Control; • Inventory Scan; and • Security Control such as Virus Scan and removal. <p>This UoC is adopted from 100546L5</p>
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Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Plan and develop an online business website
2. Code	111419L5
3. Range	This unit of competency (UoC) is applicable to IT staff in the retail industry. Practitioners have the ability to plan and develop an online business website suitable for the organisation to use according to the organisation’s business strategies in order to expand its retail business.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of online business website</p> <ul style="list-style-type: none"> ◆ Master the organisation’s online sales strategies and resources invested ◆ Master the support for the organisation’s development of mobile Apps ◆ Understand that the main objective of a business website is to make profits, with the following purposes: <ul style="list-style-type: none"> • Display corporate image • Release product information • Link to online customers • Explore new markets • Gain a great proportion of profits with less investment ◆ Understand the importance of planning and developing a business website for the organisation, e.g.: <ul style="list-style-type: none"> • Construction of website has great publicity effect • Construction of website meets with the development of times • Construction of website helps the access of detailed, useful and timely information ◆ Understand factors of considerations in online business website development, e.g.: <ul style="list-style-type: none"> • Style and creativity of website • Logo of website • Visual process • Webpage framework and layout • Colour match of website <p>6.2 Plan and develop an online business website</p> <ul style="list-style-type: none"> ◆ Plan an online business website for the organisation according to its online sales strategies and resources actually invested, e.g.: <ul style="list-style-type: none"> • Decide whether the website development will be done by the internal IT department or be outsourced • Decide the style and structure of website to meet the requirements of <ul style="list-style-type: none"> ○ Corporate business goals ○ Target group of customers ○ Characteristics of products for sale ○ Security ◆ Develop online business website for the organisation according to procedures, including: <ul style="list-style-type: none"> • Conducting studies with relevant department of the organisation to analyse and confirm the basic structure of website • Providing website construction solutions to the higher level for reference and selection • Setting up a project team to be responsible for website development • Carrying out actual development of website, e.g.: <ul style="list-style-type: none"> ○ Webpage design ○ Programme development ○ Technical synthesis ○ Upload testing ○ Launch of website • Putting forward a website promotion plan according to market situation • Providing professional training to staff members and customers in the use of website <p>6.3 Exhibit professionalism</p>

	<ul style="list-style-type: none"> ◆ Make appropriate arrangements to cater the requirements of different people (e.g. the visually impaired, the disabled) when planning the business website of the organisation ◆ Ensure that the organisation's business website design and operation comply with the government's ordinances and requirements of regulatory bodies
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Plan and develop an online business website suitable for the organisation to use in accordance with its business development; and ◆ Assist the organisation's retail business development by means of the online business website planned and developed.
8. Remark	This UoC is adopted from 105106L5

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Evaluate online business
2. Code	111420L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for policy formulation in the retail industry. Practitioners have the ability to effectively evaluate the potential of online business and profit based on factors such as the organisation’s online sales strategies, the business websites developed and the products of the organisation, etc., in order to assist the organisation’s retail business development.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of online business</p> <ul style="list-style-type: none"> ◆ Master the established online sales strategies of the organisation ◆ Master the strengths of the organisation in constructing business websites ◆ Master the existing and future resources that the organisation can invest for supporting online business ◆ Understand the key successful factors of online business, e.g. <ul style="list-style-type: none"> • Image of the organisation itself • Potential of the product in the online market • Accurate online marketing strategies • Successful brand design • Stable system development • Accurately master customer information, e.g.: <ul style="list-style-type: none"> ○ Purchase preference ○ Age group of customers ○ Areas of life and business activities ○ Inter-relationship between the above factors ◆ Understand competitors’ online business strategies and measures, etc. ◆ Master the related ordinances and regulations on online business imposed by the government and governing bodies <p>6.2 Evaluate online business</p> <ul style="list-style-type: none"> ◆ Evaluate the online business of the organisation’s product development in accordance with the established online sales strategies of the organisation and the strengths of its website, including: <ul style="list-style-type: none"> • Conducting an extensive exploratory study on the development of online business for the products of the organisation • Collecting and organising products and services of the organisation that are suitable for online sales • Conducting an analysis of Return on Investment for online business • Studying the organisation’s comparative advantages and disadvantages against its competitors in online business ◆ Evaluate other factors that may affect the feasibility of online business, including: <ul style="list-style-type: none"> • Exploring the overall economy, high-level operation mode and business propositions, etc. • Explore customers’ perception of the product value, acceptance level and usage • Overall market size • Market penetration analysis • Ability to fully utilise existing knowledge and resources in online business ◆ Study and evaluate the crucial technological factors affecting the online business ◆ Study and evaluate what effect will bring on the organisation’s online business by the regulations of government ordinances and governing bodies ◆ Integrate all aspects of feasibility evaluation and give suggestions to the management for online business, including: <ul style="list-style-type: none"> • Positioning and scale of the organisation website • The mode of sales to be adopted by the organisation website, e.g.: <ul style="list-style-type: none"> ○ Business to business (B2B) ○ Business to customer (B2C) ○ Customer to customer (C2C)

	<ul style="list-style-type: none"> • Products or services that the organisation website should give priority in sales promotion ◆ Continue to monitor and give improvement suggestions after the actual operation of the organisation website <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the benefit of the organisation and customers will be taken into account during the evaluation of the online business of the organisation ◆ Prevent any abuse of power or corrupt conduct by means of online business during the evaluation of the online business of the organisation
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Evaluate the feasibility and profit potential of online business based on factors such as the organisation's online sales strategies, website and products; and ◆ Ultimately assist the organisation's overall retail business development by its online business.
8. Remark	This UoC is adopted from 105107L5

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Use new technologies to conduct retail business
2. Code	111421L5
3. Range	This unit of competency (UoC) is applicable to IT staff in the retail industry. Practitioners have the ability to introduce new technologies and products to conduct retail business according to the established sales strategies of the organisation in order to assist its overall business development.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of new technologies</p> <ul style="list-style-type: none"> ◆ Master established overall sales strategies of the organisation ◆ Understand new technologies and products currently available for retail business, including: <ul style="list-style-type: none"> • Internet • Smart phone • Tablet computer • Other mobile communication equipment ◆ Understand the reaction of retail customers when using new technologies, e.g.: <ul style="list-style-type: none"> • Focus time is very short • Demand immediate response • Lack patience for unsuitable products • Not tolerate substandard service ◆ Understand how new technologies and products support the organisation’s existing sales mechanism ◆ Understand ordinances and regulations on the use of new technologies and products ◆ Understand the extra costs or crises that may be brought by new technologies and products to the organisation’s retail business <p>6.2 Use new technologies to conduct retail business</p> <ul style="list-style-type: none"> ◆ Consider to introduce new technologies/products/business solutions for retail business ◆ Make full use of new technologies to enhance the organisation’s retail services for customers, e.g.: <ul style="list-style-type: none"> • Provide real-time online goods search • Customers can browse user comments on goods in real time • Order goods online in real time • Direct delivery of goods from the warehouse • Join to become exclusive members and enjoy the benefits • Update the computer’s customer relationship management system of the organisation ◆ Evaluate the benefits brought by the new technologies and products to the organisation’s retail business ◆ Ensure that customers can still receive the same information and service from other sales channels while using new technologies and products ◆ Evaluate the extra costs or crises that may be brought by new technologies and products to the organisation’s retail business ◆ Set indicators for the sales channel using new technologies in order to maintain the service standard of the organisation <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Comply with relevant ordinances and regulatory requirements in the use of new technologies and products ◆ Prevent any corrupt conduct with the abuse of new technologies and products

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Use new technologies and products to conduct retail business according to the established sales strategies of the organisation; and ◆ Assist the organisation's overall retail business development by means of new technologies and products.
8. Remark	This UoC is adopted from 105108L5

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Develop an e-retail business model
2. Code	111422L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for policies in the retail industry. Practitioners have the ability to develop an e-retail business model suitable for the organisation, as resources permit, in order to develop its retail business.
4. Level	5
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of e-retail</p> <ul style="list-style-type: none"> ◆ Master the established online sales strategies and related resources of the organisation as well as the mobile phone apps ◆ Understand the advantages of introducing e-business model, e.g.: <ul style="list-style-type: none"> • Reduce operational costs • Promote commodity’s added value • Enhance the organisation’s competitiveness • Improve the relationship with customers • Improve the relationship with suppliers/business partners • Increase earnings and cash flow • Expand the market share ◆ Understand factors affecting the development of an e-retail business model, e.g.: <ul style="list-style-type: none"> • Access mode of website • Content of website (e.g. products and information) • Application used • Infrastructure to be constructed • Services provided • Charging methods ◆ Understand the regulations on e-business model and website as stipulated in the government’s ordinances <p>6.2 Develop an e-retail business model</p> <ul style="list-style-type: none"> ◆ Assess the applicability and effects of different e-retail business models (e.g. B2B, B2C) on the organisation’s retail operations ◆ Compare the strengths and characteristics of different e-retail business models ◆ Assess and consider the advantages of e-business model according to the organisation’s actual situation and needs by the following ways: <ul style="list-style-type: none"> • Explore new opportunities brought by online technologies and applications • Conduct Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis on the e-retail business model • Assess the effect of launching the retail website on the market ◆ Examine different e-retail business models and have actual experience of their operational procedures ◆ Recommend to the higher level the most appropriate e-retail business model ◆ Develop the operation plan for the selected e-retail business model <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure compliance with the relevant ordinances during the development of an e-retail business model ◆ Consider the requirements of different people (e.g. the visually impaired and the disabled) during the development of an e-retail business model
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Develop the most appropriate e-retail business model for the organisation as resources permit; and ◆ Develop an e-retail business model that supports the organisation’s retail business development.
8. Remark	This UoC is adopted from 105109L5

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Evaluate the performance of the customer service IT systems
2. Code	111423L5
3. Range	This unit of competency (UoC) is applicable to staff responsible for IT support in the retail industry. Practitioners have the ability to obtain the information on and evaluate the performance of the customer service IT systems in retail stores; use relevant information to plan and formulate related strategies of the organisation.
4. Level	5
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of IT systems for retail stores</p> <ul style="list-style-type: none"> ◆ Understand the customer service strategies of the organisation ◆ Master the IT equipment, systems and supporting facilities commonly used in retail stores, e.g.: <ul style="list-style-type: none"> • Point of sale (POS) • Digital playback system • Interactive station • Scanner, printer • Customer relationship management system (CRM) ◆ Understand the customer service criteria and practice of the industry ◆ Master the ordinances related to online business, e.g.: <ul style="list-style-type: none"> • Personal Data (Privacy) Ordinance • Copyright Ordinance • Electronic Transactions Ordinance • International rules on e-commerce ◆ Master IT project management skills <p>6.2 Evaluate the performance of the customer service IT systems</p> <ul style="list-style-type: none"> ◆ Use effective communication channels and techniques to gather users’ comments and recommendations on the organisation’s IT equipment / systems for improvement ◆ Evaluate the performance and applicability of the existing IT equipment / systems by making reference to comments from all sides and the external factors, and identify areas for improvement. Factors of consideration include: <ul style="list-style-type: none"> • Comments on equipment / system manufacturer’s performance • User comments • Service pledge of the organisation • Latest and compatible technology ◆ Upgrade and optimise the functions of the existing IT equipment / systems of the organisation regularly or when necessary to ensure that the equipment / systems used can: <ul style="list-style-type: none"> • Provide more stable, safe and easy-to-use system functions for customers • Keep abreast of the latest technological development • Meet new legal requirements • Conform to business strategies of the organisation • Adapt to the latest business environment of the market ◆ Formulate long-term optimisation plans for IT equipment / systems according to the IT equipment / system optimisation needs of the organisation and new development trend of technology <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Conduct performance evaluation of IT equipment / systems in accordance with industry customer service standards and practices ◆ Ensure that organisational resources are used according to the actual needs of the organisation ◆ Ensure that the equipment / systems used comply with the certification requirements for IT management systems (e.g. ISO20000)

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Evaluate and analyse the performance of the customer service IT systems and the optimisation needs according to factors such as customers' requirements/comments on service, the latest technological development, etc.; and ◆ Formulate appropriate optimisation plans for the customer service IT systems according to the evaluation results and the sales strategies of the organisation in order to provide quality customer service and enhance the corporate business and image.
8. Remark	This UoC is adopted from 105110L5

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Manage IT projects
2. Code	111424L6
3. Range	This unit of competency (UoC) is applicable to staff responsible for IT management in the retail industry. Practitioners have the ability to manage IT projects properly according to corporate policy; and provide the planning, consultation, support, management and implementation on related IT projects to staff and customers in order to achieve the business goals and mission of the organisation.
4. Level	6
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of IT project management</p> <ul style="list-style-type: none"> ◆ Master the details of the organisation’s IT projects in operation or to be launched ◆ Understand IT project management activities ◆ Understand IT project quality assurance activities ◆ Understand methods for the management and quality assurance of different IT projects, e.g.: <ul style="list-style-type: none"> • PMP (Project Management Professional) • PRINCE2 (Projects in Controlled Environments) ◆ Understand IT project management tools ◆ Understand IT project quality assurance tools ◆ Master the latest development in IT and project management <p>6.2 Manage IT projects</p> <ul style="list-style-type: none"> ◆ Implement the organisation’s IT projects e.g. e-business and e-trading solutions ◆ Plan the management activities for these IT projects ◆ Implement IT project management tasks ◆ Use the management and quality assurance tools to manage the planned IT project activities ◆ Carry out the related IT project activities for the organisation with maximum efficiency ◆ Use appropriate tools in project quality assurance to achieve the organisation’s business goals and mission ◆ provide consultation and support for colleagues and customers on the IT projects ◆ Assess the security risks of the IT projects and give suggestions to enhance protection ◆ Plan and implement contingency plans to deal with accidents that may occur to the existing IT projects ◆ Assess the performance of the IT projects and identify areas for improvement <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Strictly comply with corporate policy during the management of the IT projects (e.g. after budget review and security risk assessment) ◆ Prevent and avoid any abuse of power or corrupt conduct by using the vulnerabilities of the IT projects through various assessments (e.g. security risks, performance)
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Ensure the management of all IT projects of the organisation; and ◆ Ensure that the business goals and mission of the organisation can be achieved ultimately with the support of different IT projects.
8. Remark	This UoC is adopted from 105113L6

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Build an online retail platform
2. Code	111425L6
3. Range	This unit of competency (UoC) is applicable to staff responsible for IT support in the retail industry. Practitioners have the ability to build an online retail platform according to the business strategies, development plan and operational needs of the organisation in order to help the organisation to achieve a high ROI.
4. Level	6
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of building online retail platform</p> <ul style="list-style-type: none"> ◆ Master the organisation’s online retail platform strategies ◆ Understand the IT infrastructure, system and support required for building an online retail platform ◆ Master the concept, operation mode and characteristics of online retail platform, e.g.: <ul style="list-style-type: none"> • Online store • Multi-channel retail model without geographical restrictions • Search engine ◆ Understand the composition and functions of an online retail platform, including: <ul style="list-style-type: none"> • Domain name/website address • Email account • Online payment system • Shopping system • E-cert and host platform • Web marketing tools • Applications ◆ Understand the advantages of building an online retail platform and factors affecting its performance ◆ Understand the norms and standards of the organisation and the industry for online customer service ◆ Master the legal requirements for online retail platform, e.g.: <ul style="list-style-type: none"> • Personal Data (Privacy) Ordinance • Electronic Transactions Ordinance • Consumable Security regulations • Copyright Ordinance • Registered Trademark • Ordinances related to consumer protection ◆ Understand the organisation’s IT project management policy <p>6.2 Build an online retail platform</p> <ul style="list-style-type: none"> ◆ Analyse the development trend of online retail business and work with relevant decision-making personnel to formulate the targets and strategies for the organisation’s online retail business ◆ Confirm the feasibility of providing internal R&D and support for the online retail platform ◆ Formulate a comprehensive plan for building the online retail platform, including the operating cost, target ROI, timetable, etc. ◆ Identify the required software and applications for building the online retail platform, e.g.: <ul style="list-style-type: none"> • Online shopping and tracking system • Create customer accounts • Online payment system and currency of the system • Choice of languages • Report system • Business intelligence • Security system (e.g. data encryption) ◆ Design and formulate appropriate online business model and implementation plan according to the organisation’s online sales business strategies and development plan, including:

	<ul style="list-style-type: none"> • Domain name/website address design and selection • Internal R&D, outsourcing of services • Online payment system and method • Information security e.g. E-authentication tools • Marketing proposal e.g. search engine optimisation (SEO), social media and forum <ul style="list-style-type: none"> ◆ Predict potential problems or risks that may threaten the operation of online retail platform, and formulate contingency measures <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the design and operation the organisation's online retail platform comply with the ordinances and regulations of the governing bodies ◆ Prevent any corrupt conduct and fraud in using the online retail platform
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Build an online retail platform according to the business strategies, development plan and operational needs of the organisation in order to help the organisation to achieve a high ROI; and ◆ Analyse the online retail market development trend, the application of new technology and potential security threats, and formulate an effective change plan and contingency procedures accordingly.
8. Remark	This UoC is adopted from 105114L6

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Information Technology’

1. Title	Manage an enterprise resource plan
2. Code	111426L6
3. Range	This unit of competency (UoC) is applicable to staff responsible for information technology in the retail industry. Practitioners have the ability to use various types of computer software to support and improve the effectiveness of work and exercise judgement effectively and appropriately; manage corporate resources and business workflow effectively (e.g. reduce data input and storage) in order to enhance customer satisfaction and accomplish the tasks of the enterprise.
4. Level	6
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Comprehensively analyse the knowledge of enterprise resource plan (ERP)</p> <ul style="list-style-type: none"> ◆ Understand the business strategies and the retail business workflow of the organisation ◆ Analyse comprehensively the advantages and the importance of implementing retail ERP, e.g.: <ul style="list-style-type: none"> • Integrate retail and distribution • Integrate the processes of ordering and shipment of goods • Material management and inventory control • Reduce costs • Efficient financial accounting, e.g. faster and more accurate payment settlement and financial report, etc. ◆ Understand possible obstacles for the deployment of ERP, e.g. staff's resistance to change ◆ Master the organisation's retail business workflow and infrastructure ◆ Master IT project management skills and technological development trend <p>6.2 Manage an ERP</p> <ul style="list-style-type: none"> ◆ Identify and analyse the effectiveness and risks of different departments for implementing the ERP system, e.g.: <ul style="list-style-type: none"> • Customer relationship management (CRM) • Accounting applications • Sales system • Order tracking tools • Wage management system • Human resources management system ◆ Regularly review and examine the existing ERP system and new technologies <ul style="list-style-type: none"> • Ensure that the system functions and information provided meet the operational needs of the organisation • Use all functions effectively and comprehensively • Check whether the existing ERP system is upgradable or not • Develop the financial budget for the ERP system ◆ Coordinate and cooperate with the IT department to formulate an implementation plan for the ERP system, e.g.: <ul style="list-style-type: none"> • Integrate the database systems of the organisation • Confirm the priority for ERP system implementation • Assess and confirm suitable ERP system support • Confirm the scale of deployment (for one or many stores) • Implementation schedule • User training plan and schedule ◆ Update or further develop ERP procedures according to corporate needs and the development of new technologies, e.g.: <ul style="list-style-type: none"> • Timely access required data (input manually or search automatically) • Compile reports • Re-design the business workflow <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Keep pace of the latest ordinances of the government and governing bodies on information, privacy, information security, etc. to ensure that the new technologies and products do not violate the relevant laws

7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> ◆ Identify the specific requirements of respective departments in the organisation for ERP system; and ◆ Plan and implement the ERP to ensure that the system functions meet the actual needs and operate smoothly, and can provide accurate and correct information in order to enhance the business and work efficiency of the organisation.
8. Remark	This UoC is adopted from 105115L6

Units of Competency for 'Specific Product Knowledge'

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Specific Product Knowledge’

1. Title	Arrange the exhibition items of the showroom
2. Code	111427L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for showroom exhibitions in the retail industry. Practitioners have the ability to arrange the exhibition items (e.g. furniture, electrical appliances and raised platform products) of the showroom so as to support the smooth operation of the exhibitions held by the organisation.
4. Level	3
5. Credit	6 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of showroom exhibitions</p> <ul style="list-style-type: none"> ◆ Understand the details and information of the products sold by the organisation, e.g.: <ul style="list-style-type: none"> • Types of products (e.g. furniture, electrical appliances, raised platform products or other items) • Origin of products ◆ Understand the details and procedures for arranging the exhibition items of the organisation, e.g.: <ul style="list-style-type: none"> • Arrangements made before the use of products (e.g. laying work, installation and activation by power) • Noting points for the use of products (e.g. they are breakable or inflammable; they require ventilation or moisture protection) ◆ Master the knowledge and skills for managing the exhibition items of the showroom <ul style="list-style-type: none"> • Information of the showroom (e.g. area, height, platform/wall material, water and power supply) and other facilities (including the lease terms of the showroom of the organisation or rented/borrowed place) • Information of products (e.g. name, size, colour and weight) • Arrangements related to general storage locations, pickup procedures, packing and delivery of products • Characteristics of products, their maintenance methods and handling techniques ◆ Master the skills for communicating with and coordinating the internal staff of the organisation and outside bodies/outside ◆ Understand the legal and regulatory requirements for display and exhibition, e.g.: <ul style="list-style-type: none"> • Occupational Safety and Health Ordinance, Chapter 509, Laws of Hong Kong • Labelling of displayed products (e.g. labels of dangerous goods) • Restrictions on the exhibition or display of prohibited goods, infringing items and indecent articles <p>6.2 Arrange the exhibition items of the showroom</p> <ul style="list-style-type: none"> ◆ Make preparations for the exhibition, including: <ul style="list-style-type: none"> • Confirming the location (including the showroom of the organisation or rented/borrowed place) of the showroom in the exhibition, and the location of the booth assigned for the exhibition items • Confirming the schedule for the display of items, including the actual time for exhibition, the time for furnishing before the event and the time for disassembly and packing after the event • Confirming the list and quantity of exhibition items • Liaison and coordination work regarding the manpower for delivery, erecting, furnishing and cleaning ◆ Make arrangements related to exhibition items when furnishing the showroom, including: <ul style="list-style-type: none"> • Arranging the delivery of the exhibition items to the showroom/exhibition venue • Erecting the exhibition platform or stand (if necessary) according to drawings • Furnishing the exhibition booth/shelf • Counting and checking all the exhibition items • Displaying the exhibition items as planned, including assembly or laying work • Ensuring that all the exhibition items (e.g. electrical appliances) work properly and are fit for trial (e.g. furniture products)

	<ul style="list-style-type: none"> ◆ Perform the follow-up work during the exhibition period, including: <ul style="list-style-type: none"> • Monitoring whether there is a need to replace/replenish the products • Always taking note of whether related legal and regulatory requirements are met • Introducing or explaining to customers the items on display if necessary ◆ Perform the follow-up work after the exhibition, including: <ul style="list-style-type: none"> • Arranging the return of the exhibition items to the specified location • Recounting and checking all the exhibition items • Making arrangements for the clearing and cleaning of the showroom/exhibition venue (if necessary) • Submitting to the higher level a report on the exhibition/display and propose improvements <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Comply with related legal and regulatory requirements when arranging the exhibition items of the showroom so as to ensure smooth operation of exhibitions
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Arrange the exhibition items (e.g. furniture, electrical appliances and raised platform products) of the showroom according to corporate guidelines and procedures so as to ensure smooth operation of exhibitions.
8. Remark	This UoC is adopted from 105738L3

Specification of Competency Standards for the Retail Industry
Units of Competency for ‘Specific Product Knowledge’

1. Title	Identify and use display materials
2. Code	111428L3
3. Range	This unit of competency (UoC) is applicable to staff responsible for product display in the retail industry. Practitioners have the ability to use product display skills to identify and use materials suitable for window or indoor display, so as to highlight the characteristics of products to meet the sales and promotion target.
4. Level	3
5. Credit	3 (for reference only)
6. Competency	<p>Performance Requirements</p> <p>6.1 Understand the knowledge of product display and related materials</p> <ul style="list-style-type: none"> ◆ Understand the organisation’s product display strategies and guidelines for the use of materials ◆ Master the concept and skills for product display ◆ Master the characteristics of the organisation’s products and its target of publicity and promotion ◆ Possess knowledge of display materials, including: <ul style="list-style-type: none"> • Nature and composition of different materials (e.g. dust proof, heavy duty, durable) • Purposes and safe using methods of different materials (e.g. wooden rack, glass, plastic, fabric and paper products) • Noting points for the selection of materials (e.g. indoor / window display, lighting and colour, environmental principles) • Relationship between products and display materials, e.g.: <ul style="list-style-type: none"> ○ Display clothing and footwear products for display ○ Hanger and shelf unit ○ Display frame and platform ○ Model and mannequin ◆ Understand legal requirements and regulations related to display materials, e.g.: <ul style="list-style-type: none"> • Fire Safety Ordinance • Occupational Safety and Health Ordinance ◆ Understand the corporate procedures and rules for ordering materials, e.g.: quotation requirements and procedures for approving different amount of money <p>6.2 Identify and use display materials</p> <ul style="list-style-type: none"> ◆ Use product display knowledge and skills to identify and use suitable product display materials according to the display target, and the characteristics and selling points of products <ul style="list-style-type: none"> • Understand the design and requirements for display of specified products (e.g. clothing and footwear) • Confirm the types of display materials required for creating specified visual effect and prepare a material list (e.g. hanging rack, shelving rack, box, plastic thread, needle, paper products) • Check whether the condition of the materials is fit and safe for use and the quantity is adequate • Order the required materials according to corporate procedures for ordering materials (e.g. current or new supplier) • Check regularly to see whether the display materials are firmly in place or have been damaged; strengthen or replace the materials accordingly to prevent accidents ◆ Accurately record and file the information of display materials used according to corporate guidelines and procedures for future reference <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Ensure that the display materials comply with legal regulatory requirements and regulations when applying display materials
7. Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> ◆ Use product display knowledge and skills to identify and use suitable display materials that meet the safety standards according to the design of display and the characteristics and selling points of the products so as to highlight the characteristics of the products and achieve the target of product display.
8. Remark	This UoC is adopted from 105749L3

Appendix 1: Cross Reference Table for Different Versions of Units of Competency in Retail Industry

Specification of Competency Standards for the Retail Industry and Electronic-Busine Specification of Competency Standards for the Retail Industry 2.0

Title	Code	Credit	Page	No.	Updated Functional Areas	New Level	New Title	New Code	New Credit	Remark
Handle commonly-used shipping documents	104956L1	3	4-16	1	Supply Chain Management	Level 1	Handle commonly-used shipping documents	111297L1	3	
Receive goods for storage	104957L1	3	4-17	2	Supply Chain Management	Level 1	Receive goods for storage	111298L1	3	
Package goods in distribution centres	104958L1	6	4-18	3	Supply Chain Management	Level 1	Package goods in distribution centres	111299L1	6	
Handle trade documents	104959L2	6	4-19	4	Merchandising / E-commerce Merchandising	Level 2	Handle trade documents	111281L2	6	
Implement goods delivery	104960L2	6	4-20	5	Supply Chain Management	Level 2	Implement goods delivery	111300L2	6	
Receive returned goods in distribution centres	104961L2	3	4-21	6	Supply Chain Management	Level 2	Receive returned goods in distribution centres	111301L2	3	
Handle payments for purchases	104962L2	3	4-22	7	Merchandising / E-commerce Merchandising	Level 2	Handle payments for purchases	111282L2	3	
Implement the purchase	104963L3	6	4-23	8	Merchandising / E-commerce Merchandising	Level 3	Implement the purchase	111283L3	6	
Implement the import and export of goods	104964L3	3	4-24	9	Supply Chain Management	Level 3	Implement the import and export of goods	111302L3	3	
Supervise the delivery of goods	104965L3	6	4-25	10	Supply Chain Management	Level 3	Supervise the delivery of goods	111303L3	6	The UoC title in Chinese is revised.
Supervise the product distribution process	104966L3	6	4-26	11	Supply Chain Management	Level 3	Supervise the product distribution process	111304L3	6	The UoC title in Chinese is revised.
Implement logistic safety and health management measures	104967L3	3	4-27	12	Supply Chain Management	Level 3	Implement logistic safety and health management measures	111305L3	3	
Monitor the inventory level to meet the demand	104968L3	3	4-28	13	Supply Chain Management	Level 3	Monitor the inventory level to meet the demand	111306L3	3	
Implement inventory procedures	104969L3	6	4-29	14	Supply Chain Management	Level 3	Implement inventory procedures	111307L3	6	
Introduce products	104970L3	6	4-30	15	Merchandising / E-commerce Merchandising	Level 3	Introduce products	111284L3	6	
Buy goods	104971L3	6	4-31	16	Merchandising / E-commerce Merchandising	Level 3	Buy goods	111285L3	6	
Implement quality control of goods	104972L3	3	4-32	17	Merchandising / E-commerce Merchandising	Level 3	Implement quality control of goods	111286L3	3	
Arrange maintenance and repair for transportation means	104973L3	3	4-33	18	Supply Chain Management	Level 3	Arrange maintenance and repair for transportation means	111308L3	3	
Perform retail inventory management	104974L3	6	4-34	19	Supply Chain Management	Level 3	Perform retail inventory management	111309L3	6	
Implement e-commerce logistics operating procedures	104975L4	6	4-35	20	Supply Chain Management	Level 4	Implement e-commerce logistics operating procedures	111310L4	6	
Implement logistics management business continuity plan	104976L4	6	4-36	21	Supply Chain Management	Level 4	Implement logistics management business continuity plans	111311L4	6	The UoC title is revised.
Manage inventory	104977L4	6	4-37	22	Supply Chain Management	Level 4	Manage inventory	111312L4	6	
Handle problems with suppliers	104978L4	6	4-38	23	Merchandising / E-commerce Merchandising	Level 4	Handle problems with suppliers	111287L4	6	
Establish partnerships with suppliers	104979L4	6	4-39	24	Merchandising / E-commerce Merchandising	Level 4	Establish partnerships with suppliers	111288L4	6	
Import goods	104980L4	6	4-40	25	Merchandising / E-commerce Merchandising	Level 4	Import goods	111289L4	6	
Provide logistic support	104981L4	6	4-41	26	Supply Chain Management	Level 4	Provide logistic support	111313L4	6	
Manage relationship with suppliers	104982L5	6	4-42	27	Merchandising / E-commerce Merchandising	Level 5	Manage relationships with suppliers	111290L5	6	The UoC title is revised.
Negotiate a contract	104983L5	6	4-43	28	Merchandising / E-commerce Merchandising	Level 5	Negotiate a contract	111291L5	6	
Formulate inventory control systems	104984L5	6	4-44	29	Supply Chain Management	Level 5	Formulate inventory control systems	111315L5	6	
Warehouse space utilisation and layout planning	104985L5	3	4-45	30	Supply Chain Management	Level 5	Optmise warehouse space utilisation and layout planning	111316L5	3	The UoC title is revised.
Manage logistics equipment	104986L5	3	4-46	31	Supply Chain Management	Level 5	Manage logistics equipment	111317L5	3	
Establish and maintain a supply chain	104987L5	6	4-47	32	Supply Chain Management	Level 5	Establish and maintain a supply chain	111318L5	6	

Specification of Competency Standards for the Retail Industry and Electronic-Busine Specification of Competency Standards for the Retail Industry 2.0

<u>Title</u>	<u>Code</u>	<u>Credit</u>	<u>Page</u>	<u>No.</u>	<u>Updated Functional Areas</u>	<u>New Level</u>	<u>New Title</u>	<u>New Code</u>	<u>New Credit</u>	<u>Remark</u>
Formulate inventory management strategies	104988L5	6	4-48	33	Supply Chain Management	Level 5	Formulate inventory management strategies	111319L5	6	
Plan a purchasing system	104989L5	6	4-49	34	Merchandising / E-commerce Merchandising	Level 5	Plan a purchasing system	111292L5	6	
Purchase goods	104990L5	6	4-50	35	Merchandising / E-commerce Merchandising	Level 5	Purchase goods	111293L5	6	
Develop logistics management business continuity plans	104991L5	6	4-51	36	Supply Chain Management	Level 5	Develop logistics management business continuity plans	111320L5	6	The UoC title in Chinese is revised.
Improve the supply and distribution chain	104992L6	6	4-52	37	Supply Chain Management	Level 6	Improve the supply and distribution chain	111321L6	6	
Manage international purchasing	104993L6	6	4-53	38	Merchandising / E-commerce Merchandising	Level 6	Manage international purchasing	111295L6	6	
Formulate purchasing strategy	104994L6	9	4-54	39	Merchandising / E-commerce Merchandising	Level 6	Formulate purchasing strategy	111296L6	6	The QF credit is adjusted from 9 to 6.
Formulate cross-border logistics solutions	104995L6	6	4-55	40	Supply Chain Management	Level 6	Formulate cross-border logistics solutions	111322L6	6	
Handle logistics crises	104996L6	6	4-56	41	Supply Chain Management	Level 6	Handle logistics crises	111323L6	6	
Formulate risk management plans	104997L6	3	4-57	42	Supply Chain Management	Level 6	Formulate risk management plans	111324L6	3	
Manage third party logistics services	104998L6	6	4-58	43	Supply Chain Management	Level 6	Manage third party logistics services	111325L6	6	
Apply related occupational safety and health regulations	104999L1	3	4-59	44						
Comply with anti-bribery law and adopt a high standard of integrity in performing retail functions	106886L1	1	4-60	45	Human Resource Management & Development	Level 1	Comply with anti-bribery law and adopt a high standard of integrity in performing retail functions	111370L1	1	
Record and verify staff attendance information	105000L2	6	4-61	46	Human Resource Management & Development	Level 2	Record and verify staff attendance information	111371L2	6	
Handle staff records	105001L2	3	4-62	47	Human Resource Management & Development	Level 2	Handle staff records	111372L2	3	
Apply general labour regulations	105002L2	6	4-63	48	Human Resource Management & Development	Level 2	Apply general labour regulations	111373L2	6	
Recruit and select personnel	105003L3	3	4-64	49	Human Resource Management & Development	Level 3	Recruit and select personnel	111374L3	3	
Handle staff complaints	105004L3	3	4-65	50	Human Resource Management & Development	Level 3	Handle staff complaints	111375L3	3	
Arrange product training	105005L3	3	4-66	51						
Provide in-service training	105006L3	3	4-67	52	Human Resource Management & Development	Level 3	Provide in-service training	111376L3	3	
Arrange soft skills training	105007L3	3	4-68	53						
Implement human resources policies	105008L3	3	4-69	54	Human Resource Management & Development	Level 3	Implement human resources policies	111377L3	3	
Promote equality policy	105009L3	6	4-71	55	Human Resource Management & Development	Level 3	Promote equality policy	111378L3	6	
Handle salary payment	105010L3	6	4-72	56						
Implement staff appraisal policy	105011L3	3	4-73	57	Human Resource Management & Development	Level 3	Implement staff appraisal policy	111379L3	3	
Implement “clean” business practices, good controls and integrity management	105752L3	3	4-74	58	Human Resource Management & Development	Level 3	Implement “clean” business practices, good controls and integrity management	111380L3	3	
Implement “clean” business practices, good controls and integrity management										
Manage the human resources information system	105012L4	3	4-75	59	Human Resource Management & Development	Level 4	Manage the human resources information system	111381L4	3	
Formulate staff working guidelines	105013L4	3	4-76	60						
Analyse training need and develop staff training and development programmes	105014L4	3	4-77	61	Human Resource Management & Development	Level 4	Analyse training needs and develop staff training and development programmes	111382L4	3	The UoC title is revised.

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Handle general labour disputes	105015L4	6	4-78	62	Human Resource Management & Development	Level 4	Handle general labour disputes	111383L4	6	
Handle staff remuneration and benefits	105016L4	6	4-79	63	Human Resource Management & Development	Level 4	Handle staff remuneration and benefits	111384L4	6	
Formulate a staff training and development plan	105017L5	3	4-80	64	Human Resource Management & Development	Level 5	Formulate a staff training and development plan	111385L5	3	
Formulate a staff retention plan	105018L5	6	4-81	65	Human Resource Management & Development	Level 5	Formulate a staff retention plan	111386L5	6	
Formulate human resources strategy	105019L6	3	4-82	66	Human Resource Management & Development	Level 6	Formulate human resources strategy and policies	111388L6	3	The UoC title is revised.
Comply with business laws	105020L3	6	4-83	67	Strategic and ESG Management	Level 3	Comply with business laws	111221L3	6	
Implement business plan	105021L4	6	4-84	68	Strategic and ESG Management	Level 4	Implement business plan	111223L4	6	
Audit loss prevention policies	105022L4	6	4-85	69	Strategic and ESG Management	Level 4	Audit loss prevention policies	111224L4	6	
Manage budget and financial plan	105023L4	6	4-86	70	Strategic and ESG Management	Level 4	Manage budget and financial plan	111225L4	6	
Formulate business plan	105024L5	6	4-87	71						
Monitor financial performance	105025L5	6	4-88	72						
Manage financial information	105026L5	6	4-89	73						
Compile financial reports	105027L5	6	4-90	74						
Manage operational budget	105028L5	6	4-91	75						
Perform audit	105029L5	6	4-92	76						
Explore store locations	105030L5	6	4-93	77						
Negotiate a store contract	105031L5	6	4-94	78						
Develop policies of the organisation	105032L6	6	4-95	79	Strategic and ESG Management	Level 6	Develop and implement policies of the organisation	111230L6	6	The UoC title is revised.
Formulate environmental sales strategy	105033L6	6	4-96	80						
Formulate business continuity strategies	105034L6	6	4-97	81	Strategic and ESG Management	Level 6	Formulate sustainable business strategies	111231L6	6	The UoC title is revised.
Formulate financial management policies	105035L6	6	4-98	82	Strategic and ESG Management	Level 6	Formulate financial management policies	111232L6	6	
Build an organisational image	105036L6	6	4-99	83	Strategic and ESG Management	Level 6	Build an organisational image	111233L6	6	
Formulate business and talent strategies	105037L7	6	4-100	84	Strategic and ESG Management	Level 7	Formulate business and talent strategies	111236L7	6	The UoC title in Chinese is revised.
Preparations for commodity display	105038L1	3	4-101	85	Sales, Marketing and Multi-channel Sales Management	Level 1	Prepare for commodity display	111237L1	3	The UoC title is revised.
Self-quality management	105039L1	3	4-102	86	Sales, Marketing and Multi-channel Sales Management	Level 1	Practise self-quality management	111238L1	3	The UoC title is revised.
Collect market information	105040L2	3	4-103	87	Sales, Marketing and Multi-channel Sales Management	Level 2	Collect market information	111239L2	3	
Create media kits	105041L2	6	4-104	88	Sales, Marketing and Multi-channel Sales Management	Level 2	Produce slides / presentation materials and media kits in line with corporate branding	111240L2	6	The UoC title is revised.
Perform customer classification	105042L2	6	4-105	89						
Promote loyalty programmes to customers	105043L2	6	4-106	90	Sales, Marketing and Multi-channel Sales Management	Level 2	Promote loyalty programmes to customers	111241L2	6	
Implement brand promotion strategies	105044L3	6	4-107	91	Sales, Marketing and Multi-channel Sales Management	Level 3	Implement strategies for brand promotion and multi-channel sales management	111242L3	6	The UoC title is revised.
Implement product recall	105045L3	6	4-108	92						
Implement advertising and promotional activities	105046L3	6	4-109	93	Sales, Marketing and Multi-channel Sales Management	Level 3	Implement advertising and promotional activities	111243L3	6	
Implement a sales plan	105047L3	6	4-110	94	Sales, Marketing and Multi-channel Sales Management	Level 3	Implement a sales plan	111244L3	6	
Provide basic sales training	105048L3	6	4-111	95						
Carry out online market communication	105049L3	6	4-112	96						
Implement pricing strategies	105050L3	6	4-113	97						

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Lead a sales team	105051L4	6	4-114	98	Sales, Marketing and Multi-channel Sales Management	Level 4	Build and lead a sales team	111250L4	6	The UoC title is revised.
Implement a market research proposal	105052L4	6	4-115	99	Sales, Marketing and Multi-channel Sales Management	Level 4	Implement a market research proposal	111251L4	6	
Implement and monitor marketing activities	105053L4	6	4-116	100	Sales, Marketing and Multi-channel Sales Management	Level 4	Implement and monitor marketing activities	111252L4	6	
Monitor sales performance of goods	105054L4	3	4-117	101						
Manage goods promotional activities	105055L4	6	4-118	102	Sales, Marketing and Multi-channel Sales Management	Level 4	Manage goods promotional activities	111253L4	6	
Plan online market communication	105056L4	3	4-119	103	Sales, Marketing and Multi-channel Sales Management	Level 4	Plan online multi-channel marketing communications	111254L4	3	The UoC title is revised.
Implement advertising strategies	105057L4	3	4-120	104	Sales, Marketing and Multi-channel Sales Management	Level 4	Implement advertising strategies	111255L4	3	
Implement environmental sales strategies	105058L4	6	4-121	105						
Formulate a market research proposal	105059L5	6	4-122	106	Sales, Marketing and Multi-channel Sales Management	Level 5	Formulate a market research proposal	111258L5	6	
Formulate brand promotion strategies	105060L5	6	4-123	107	Sales, Marketing and Multi-channel Sales Management	Level 5	Formulate brand promotion and multi-channel sales management strategies	111259L5	6	The UoC title is revised.
Forecast product sales performance	105061L5	6	4-124	108	Sales, Marketing and Multi-channel Sales Management	Level 5	Forecast product sales performance	111260L5	6	
Manage an online retail brand	105062L5	6	4-125	109	Sales, Marketing and Multi-channel Sales Management	Level 5	Manage an online retail brand	111261L5	6	
Perform public relations crisis management	105063L5	6	4-126	110	Strategic and ESG Management	Level 5	Formulate crisis management policies in public relations for relevant areas of work, and monitor the progress of responding to and handling crisis	111227L5	6	The UoC title is revised.
Formulate after-sales service plans	105064L5	3	4-127	111	Sales, Marketing and Multi-channel Sales Management	Level 5	Formulate after-sales service plans	111262L5	3	
Formulate product pricing strategies	105065L5	6	4-128	112	Sales, Marketing and Multi-channel Sales Management	Level 5	Formulate product pricing strategies	111263L5	6	
Formulate sales team incentive plans	105066L5	3	4-129	113	Sales, Marketing and Multi-channel Sales Management	Level 5	Formulate sales team incentive plans	111264L5	3	
Master the retail market trend	105067L5	6	4-130	114	Sales, Marketing and Multi-channel Sales Management (Combined)	Level 5	Master the retail market trend		6	
Formulate sales team management strategies	105068L6	6	4-131	115	Sales, Marketing and Multi-channel Sales Management	Level 6	Formulate sales team management strategies	111268L6	6	
Formulate marketing strategies	105069L6	6	4-132	116	Sales, Marketing and Multi-channel Sales Management	Level 6	Formulate marketing, marketing channels and media strategies	111269L6	6	The UoC title is revised.
Formulate market development objectives	105070L6	6	4-133	117	Sales, Marketing and Multi-channel Sales Management	Level 6	Monitor the retail market trends and formulate market development objectives	111270L6	6	The UoC title is revised.
Provide support and advice to customers	105071L1	3	4-134	118	Customer Services	Level 1	Provide support and advice to customers	111327L1	3	
Serve customers	105072L1	3	4-135	119	Customer Services	Level 1	Serve customers	111328L1	3	
Comply with professional ethics and staff code of practice	105073L1	3	4-136	120						
Build up relationship with customers	105074L2	3	4-137	121	Customer Services	Level 2	Build up relationship with customers	111329L2	3	
Use good communication skills to facilitate transactions	105075L2	3	4-138	122	Customer Services	Level 2	Use good communication skills to facilitate transactions	111330L2	3	
Implement quality customer service scheme	105076L3	6	4-139	123	Customer Services	Level 3	Implement quality customer service scheme	111331L3	6	
Compile customer relationship management (CRM) system data	105077L3	3	4-140	124						
Master consumer psychology and behaviour	105078L3	3	4-141	125	Customer Services	Level 3	Master consumer psychology and behaviour	111332L3	3	
Handle customers' complaints	105079L3	3	4-142	126	Customer Services	Level 3	Handle customers' complaints	111333L3	3	

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Review products and services to maintain customer satisfaction level	105080L4	3	4-143	127	Customer Services	Level 4	Review products and services to maintain customer satisfaction level	111335L4	3	
Manage mystery shopper activities	105081L4	3	4-144	128						
Review customer service scheme	105082L4	6	4-146	129	Customer Services	Level 4	Review customer service scheme	111336L4	6	
Establish customer service performance criteria	105083L5	3	4-147	130	Customer Services	Level 5	Establish customer service performance criteria	111339L5	3	
Establish quality guarantee for customer satisfaction	105084L5	6	4-148	131	Customer Services	Level 5	Establish quality guarantee for customer satisfaction	111340L5	6	
Formulate customer service scheme	105085L5	3	4-149	132	Customer Services	Level 5	Formulate customer service scheme	111341L5	3	
Formulate customer relationship management (CRM) strategies	105086L6	6	4-150	133	Customer Services	Level 6	Formulate customer relationship management strategies	111342L6	6	The UoC title is revised.
Formulate customer service management (CSM) strategies	105087L6	6	4-152	134	Customer Services	Level 6	Formulate customer service management strategies	111343L6	6	The UoC title is revised.
Operate IT equipment / systems for retail business	105088L2	3	4-154	135	Information Technology	Level 2	Operate IT equipment / systems for retail business	111398L2	3	
Provide retail reports	105089L2	3	4-155	136						
Retain online customers	105090L2	3	4-156	137	Information Technology	Level 2	Retain online customers	111399L2	3	
Conduct online sales	105091L2	3	4-157	138	Information Technology	Level 2	Conduct online sales	111400L2	3	
Undertake general administrative work for accounts services	100221L2	3	4-153	139	Information Technology	Level 2	Undertake general administrative work for accounts services	111397L2	3	
Repair IT equipment / systems	105092L3	3	4-159	140	Information Technology	Level 3	Repair IT equipment / systems	111403L3	3	
Manage online brands	105093L3	6	4-160	141	Information Technology	Level 3	Manage online brands	111404L3	6	
Manage online sales system	105094L3	3	4-162	142	Information Technology	Level 4	Manage online sales system	111410L4	3	The QF level is adjusted from Level 3 to Level 4.
Manage online payment systems	105095L3	6	4-163	143						
Manage online shopping	105096L3	3	4-164	144	Information Technology	Level 3	Manage online shopping	111405L3	3	
Manage online inventory	105097L3	6	4-165	145	Information Technology	Level 3	Manage online inventory	111406L3	6	
Manage online business supply chain	105098L3	3	4-166	146						
Manage customer profile and activity record	100223L3	4	4-158	147	Information Technology	Level 3	Handle customer profile and activity record	111402L3	4	The UoC title is revised.
Set up IT equipment needed for retail operations	105099L4	3	4-169	148	Information Technology	Level 4	Set up IT equipment needed for retail operations	111411L4	3	
Deploy information technology equipment / systems for retail operations	105100L4	3	4-170	149	Information Technology	Level 4	Deploy information technology equipment / systems for retail operations	111412L4	3	
Use mobile technologies to improve sales service	105101L4	6	4-171	150	Information Technology	Level 4	Use mobile technologies to improve sales service	111413L4	6	
Implement e-retail business model	105102L4	6	4-172	151	Information Technology	Level 4	Implement e-retail business model	111414L4	6	
Manage online commercial risks	105103L4	6	4-173	152	Information Technology	Level 4	Manage online commercial risks	111415L4	6	
Incorporate and fine-tune strategic proposals by other organisations such as outsourcing party	100228L4	3	4-167	153	Information Technology	Level 4	Incorporate and fine-tune the proposals by other organisations such as outsourcing party	111408L4	3	The UoC title is revised.
Deliver the database operations services	100536L4	14	4-168	154	Information Technology	Level 4	Deliver the database operations services	111409L4	14	
Manage business intelligence	105104L5	6	4-177	155						
Formulate online sales strategies	105105L5	6	4-178	156						
Plan and develop an online business website	105106L5	6	4-179	157	Information Technology	Level 5	Plan and develop an online business website	111419L5	6	
Evaluate online business	105107L5	6	4-180	158	Information Technology	Level 5	Evaluate online business	111420L5	6	
Use new technologies to conduct retail business	105108L5	6	4-181	159	Information Technology	Level 5	Use new technologies to conduct retail business	111421L5	6	
Develop an e-retail business model	105109L5	6	4-182	160	Information Technology	Level 5	Develop an e-retail business model	111422L5	6	
Evaluate the performance of the customer service IT systems	105110L5	3	4-183	161	Information Technology	Level 5	Evaluate the performance of the customer service IT systems	111423L5	3	
Manage outsourced online businesses	105111L5	3	4-184	162						
Monitor and control the project cost	100336L5	2	4-174	163	Information Technology	Level 5	Monitor and control the project cost	111417L5	2	

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Develop a network technology architecture model	100394L5	5	4-175	164						
Establish and maintain system support services process	100546L5	8	4-176	165	Information Technology	Level 5	Establish and maintain system support services process	111418L5	8	
Establish information database management policies	105112L6	6	4-185	166						
Manage IT projects	105113L6	6	4-186	167	Information Technology	Level 6	Manage IT projects	111424L6	6	
Build an online retail platform	105114L6	3	4-187	168	Information Technology	Level 6	Build an online retail platform	111425L6	3	
Manage an enterprise resource plan	105115L6	3	4-189	169	Information Technology	Level 6	Manage an enterprise resource plan	111426L6	3	
Implement hygiene procedures	105116L1	3	4-190	170	Store Operations	Level 1	Implement hygiene procedures	111344L1	3	
Implement procedures for the sale of age restricted goods	105117L1	3	4-191	171						
Perform the procedures for store inventory control	105118L2	6	4-192	172						
Perform retail sales system clearing	105119L2	3	4-193	173	Store Operations	Level 2	Perform retail sales system clearing	111345L2	3	
Replenish shelves	105120L2	3	4-194	174	Store Operations	Level 2	Replenish shelves	111346L2	3	
Pack goods	105121L2	3	4-195	175						
Handle goods delivery	105122L2	3	4-196	176						
Handle goods return	105123L2	6	4-197	177						
Commit to the work of the retail team	105124L2	3	4-198	178	Store Operations	Level 2	Commit to the work of the retail team	111347L2	3	
Prevent theft	105125L2	3	4-199	179						
Handle damageable goods	105126L2	3	4-200	180						
Process orders	105127L2	3	4-201	181	Store Operations	Level 2	Process orders	111348L2	3	
Handle cash and credit card transaction payment	105128L2	6	4-202	182	Store Operations	Level 2	Handle cash and credit card transaction payment	111349L2	6	
Implement work safety guidelines	105129L2	3	4-203	183	Store Operations	Level 2	Implement work safety guidelines	111350L2	3	
Keep the retail environment clean and tidy	105130L2	3	4-204	184	Store Operations	Level 2	Keep the retail environment clean and tidy	111351L2	3	
Implement store design plan	105131L3	6	4-205	185	Store Operations	Level 3	Implement store design plan	111352L3	6	
Implement shop security procedures	105132L3	3	4-206	186	Store Operations	Level 3	Implement shop security procedures	111353L3	3	
Deploy staff	105133L3	3	4-207	187	Store Operations	Level 3	Deploy staff	111354L3	3	
Implement first aid procedures	105134L3	3	4-208	188						
Identify and watch suspicious customers	105135L3	3	4-209	189						
Set up goods classification	105136L3	6	4-210	190	Store Operations	Level 3	Set up goods classification	111355L3	6	
Implement preventive measures against loss of good	105137L3	6	4-211	191						
Use the retail sales system	105138L3	3	4-212	192	Store Operations	Level 3	Use the retail sales system	111356L3	3	
Manage store facilities and repair	105139L3	6	4-213	193						
Implement commodity display	105140L3	6	4-214	194	Store Operations	Level 3	Implement commodity display	111357L3	6	
Manage and maintain workplace	105141L4	6	4-215	195	Store Operations	Level 4	Manage and maintain workplace	111358L4	6	
Provide well-maintained security environment at stores	105142L4	6	4-216	196						
Implement crisis management plan	105143L4	3	4-217	197						
Manage franchise operations	105144L4	6	4-218	198						
Manage the termination of franchise	105145L4	6	4-219	199	Store Operations	Level 4	Manage the termination of franchise	111359L4	6	
Manage the retail team	105146L4	3	4-220	200	Store Operations	Level 4	Manage the retail team	111360L4	3	
Implement risk management of retail store	105147L4	6	4-221	201						
Inspect the product loss prevention measures	105148L4	3	4-222	202	Store Operations	Level 4	Inspect the product loss prevention measures	111361L4	3	
Manage the financial resources of the retail store	105149L4	6	4-223	203	Store Operations	Level 4	Manage the financial resources of the retail store	111362L4	6	
Monitor repair services	105150L4	6	4-224	204						
Manage retail store inventory	105151L4	6	4-225	205	Store Operations	Level 4	Manage retail store inventory	111363L4	6	
Manage store displays	105152L4	6	4-227	206	Store Operations	Level 4	Manage store displays	111364L4	6	
Manage the subordinate's work performance	105153L4	6	4-228	207	Store Operations	Level 4	Manage the subordinate's work performance	111365L4	6	

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Develop risk management strategies	105154L5	3	4-229	208	Store Operations	Level 5	Develop risk management strategies	111366L5	3	
Draw up store and window design plans	105155L5	3	4-230	209	Store Operations	Level 5	Draw up store and window design plans	111367L5	3	
Establish occupational health and safety guidelines for staff	105156L5	3	4-231	210						
Formulate the operating procedures of the retail sales system	105157L5	6	4-232	211	Store Operations	Level 5	Establish the retail sales system	111368L5	6	The UoC title is revised.
Formulate a property management plan	105158L5	9	4-233	212						
Manage store renovation	105159L5	6	4-234	213						
Formulate a retail store risk management plan	105160L5	6	4-236	214	Store Operations	Level 5	Formulate a retail store risk management plan	111369L5	6	
Inspect store location specifications	105161L5	3	4-237	215						
Formulate franchise strategies	105162L6	3	4-238	216						
Formulate product loss prevention policy	105163L6	3	4-239	217						
Know about food labelling	105700L1	3	4-240	218						
Handle the sale of fish and shellfish products	105701L2	6	4-241	219						
Handle the sale of vegetables and fruits	105702L2	6	4-243	220						
Handle the sale of meat products	105703L2	6	4-244	221						
Handle the sale of ready to eat products	105704L2	6	4-246	222						
Carry out food/drink sampling promotion activities	105705L2	6	4-248	223						
Display food	105706L2	3	4-249	224						
Display liquor	105707L2	3	4-251	225						
Display cigarettes	105708L2	3	4-253	226						
Display cigars	105709L2	3	4-254	227						
Maintain food safety	105710L2	3	4-256	228						
Transport and store liquor	105711L3	6	4-257	229						
Transport and store tobacco	105712L3	6	4-258	230						
Transport and store food	105713L3	6	4-259	231						
Introduce liquor products	105714L3	6	4-260	232						
Master the characteristics and selling points of products (food / liquor / tobacco)	105715L4	6	4-262	233						
Formulate the handling procedures for food	105716L5	6	4-263	234						
Formulate the handling procedures for liquor	105717L5	6	4-265	235						
Formulate the handling procedures for tobacco	105718L5	6	4-267	236						
Comply with safety codes/guidelines for electrical products	105719L1	3	4-269	237						
Tune electronic products	105720L2	3	4-270	238						
Display household electrical products	105721L2	3	4-271	239						
Introduce cameras and photographic equipment	105722L3	3	4-273	240						
Give demonstrations of cameras and photographic equipment	105723L3	3	4-274	241						
Introduce musical/audio products	105724L3	3	4-275	242						
Give demonstrations of musical/audio products	105725L3	3	4-276	243						
Introduce computer/mobile phone products	105726L3	3	4-277	244						

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Give demonstrations of computer/mobile phone products	105727L3	3	4-278	245	Specific Product Knowledge	Level 3	Arrange the exhibition items of the showroom	111427L3	6	
Introduce household electrical products	105728L3	3	4-279	246						
Give demonstrations of household electrical products	105729L3	3	4-281	247						
Provide after-sales service for electronic products/household electrical products	105730L3	3	4-282	248						
Master the characteristics and selling points of electronic products	105731L4	6	4-283	249						
Master the characteristics and selling points of household electrical products	105732L4	6	4-284	250						
Assemble furniture for customers	105733L2	3	4-285	251						
Provide furniture after-sales service	105734L2	3	4-286	252						
Introduce platform flooring products	105735L3	3	4-287	253						
Introduce household decorations	105736L3	3	4-288	254						
Manage the display of furniture	105737L3	6	4-290	255						
Arrange the exhibition items of the showroom	105738L3	6	4-292	256						
Master the characteristics and selling points of furniture	105739L4	6	4-293	257						
Design the furniture showroom	105740L5	6	4-294	258						
Dismantle clothing and footwear displays	105741L1	3	4-296	259						
Provide fitting service for customers	105742L1	3	4-297	260						
Perform the display of clothing and footwear at the store	105743L2	3	4-298	261						
Perform the window display of clothing and footwear at the store	105744L2	3	4-299	262						
Arrange clothing and footwear display props	105745L2	3	4-300	263						
Introduce clothing and accessories	105746L3	3	4-301	264						
Introduce footwear	105747L3	3	4-302	265						
Plan the display of clothing and footwear	105748L3	3	4-303	266						
Identify and use display materials	105749L3	3	4-305	267	Specific Product Knowledge	Level 3	Identify and use display materials	111428L3	3	
Master the characteristics and selling points of clothing	105750L4	6	4-306	268	Sales, Marketing and Multi-channel Sales Management	Level 3	Edit the text content of website	111245L3	6	
Master the characteristics and selling points of footwear products	105751L4	6	4-307	269						
Edit the text content of website	107112L3	6	5-1	270						
Edit the image content of website	107113L3	6	5-2	271						
Edit the audio content of website	107114L3	6	5-3	272						
Edit the video content of website	107115L3	6	5-4	273						
Maintain the security of the website user information	107116L4	6	5-5	274						
Manage Website Content	107289L4	6	5-6	275	Sales, Marketing and Multi-channel Sales Management	Level 4	Manage the content for website / digital marketing	111256L4	6	The UoC title is revised.
Develop Website Content Consolidation Strategy	107117L5	6	5-7	276						

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Manage website advertisement	107118L5	6	5-8	277	Sales, Marketing and Multi-channel Sales Management	Level 5	Manage website advertisement	111265L5	6	
Plan and manage network activities	107119L5	6	5-9	278						
Develop website thematic content	107120L5	6	5-10	279						
Master and evaluate the service provider for e-business website establishment	107121L5	3	5-11	280						
Establish the overall framework of website content	107122L5	3	5-12	281	Sales, Marketing and Multi-channel Sales Management	Level 5	Establish the overall framework of website content	111266L5	3	
Perform customer relationship management system operating procedures	107129L3	6	5-21	282						
Prepare data report of customer relationship management system	107130L4	6	5-22	283						
Apply spreadsheet for operational data analysis	107138L3	12	5-33	284						
Analyse procurement data	107139L3	3	5-34	285						
Analyse sales data	107140L3	3	5-35	286						
Interpret various types of financial reports	107141L4	6	5-36	287						
Apply practical financial statistics and analysis systems	107142L4	6	5-37	288						
Analyse sales volume and gross margin	107143L5	6	5-38	289						
Analyse return on investment	107144L5	6	5-39	290						
Analyse corporate business profit	107145L5	6	5-40	291						
Prepare business data analysis report	107146L6	6	5-41	292						
Develop big data strategy	107147L6	6	5-42	293						
Analyse and develop corporate financing channels	107148L7	6	5-43	294						
Manage imported and exported goods for cross-border e-business	107149L4	6	5-70	295	Supply Chain Management	Level 4	Manage imported and exported goods for cross-border e-business	111314L4	6	
Formulate cross-border e-business strategy in Hong Kong and China	107150L6	6	5-88	296						
Formulate cross-border warehousing and logistics strategy	107151L6	6	5-89	297	Supply Chain Management	Level 6	Formulate cross-border warehousing and logistics strategy	111326L6	6	
Monitor and guide public opinion	107152L3	3	5-90	298						
Conduct market research and analysis	107153L4	6	5-91	299	Customer Relationship Management	Level 4	Manage crisis of social media public relations	111274L4	6	The UoC title is revised.
Manage crisis of social media public relationship	107154L4	6	5-92	300						
Manage crisis of internet public relationship	107157L4	6	5-93	301	Customer Relationship Management	Level 4	Manage crisis of internet public relations	111275L4	6	The UoC title is revised.
Place online advertisement	107155L5	12	5-94	302						
Plan and implement large-scale internet marketing activities	107156L5	6	5-95	303						
Manage and monitor outsourcing e-business service provider	107158L5	6	5-96	304						
Develop an integrated internet marketing plan	107159L6	12	5-97	305						
Develop data optimization marketing plan	107160L6	12	5-99	306						
Apply 2D barcode on sales business	107161L4	6	5-100	307						
Apply QR code on sales business	107162L4	6	5-101	308						
Implement the barcode production steps	107163L4	6	5-102	309						

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Develop internet advertisement sales strategy	107164L5	6	5-104	310						
Analyze the payment methods of internet advertisement	107165L5	12	5-105	311						
Develop social media marketing strategy - blog platform	107166L5	6	5-107	312	Sales, Marketing and Multi-channel Sales Management	Level 5	Develop digital marketing strategy	111267L5	6	The UoC title is revised.
Develop social media marketing strategy - Weibo platform	107167L5	6	5-108	313	Sales, Marketing and Multi-channel Sales Management (Combined)	Level 5	Develop social media marketing strategy - Weibo platform		6	
Develop social media marketing strategy - forum platform	107168L5	6	5-109	314	Sales, Marketing and Multi-channel Sales Management (Combined)	Level 5	Develop social media marketing strategy - forum platform		6	
Develop social media marketing strategy - Facebook platform	107169L5	6	5-110	315	Sales, Marketing and Multi-channel Sales Management (Combined)	Level 5	Develop social media marketing strategy - Facebook platform		6	
Develop social media marketing strategy - Instagram	107170L5	6	5-111	316	Sales, Marketing and Multi-channel Sales Management (Combined)	Level 5	Develop social media marketing strategy - Instagram		6	
Develop social media marketing strategy - WeChat platform	107171L5	6	5-112	317	Sales, Marketing and Multi-channel Sales Management (Combined)	Level 5	Develop social media marketing strategy - WeChat platform		6	
Develop EDM marketing strategy - Email platform	107172L5	6	5-113	318	Sales, Marketing and Multi-channel Sales Management (Combined)	Level 5	Develop EDM marketing strategy - Email platform		6	
Develop EDM marketing strategy - SMS platform	107173L5	6	5-114	319	Sales, Marketing and Multi-channel Sales Management (Combined)	Level 5	Develop EDM marketing strategy - SMS platform		6	
Develop real-time marketing strategy	107174L5	6	5-115	320						
Search engine optimization	107175L5	6	5-116	321						
Develop search engine marketing strategy	107176L5	6	5-117	322						
Develop news and soft article marketing strategy and promote corporate public relations	107177L5	12	5-118	323						
Develop mobile device marketing strategy	107178L6	12	5-120	324						
Develop global data synchronization network system strategy	107179L6	6	5-121	325						
Develop word-of-mouth marketing strategy	107180L7	3	5-122	326						
Provide product information	107181L2	3	5-123	327	Customer Relationship Management	Level 2	Provide product information	111271L2	3	
Provide purchase suggestions to guide customers to purchase	107182L3	3	5-124	328						
Manage online customer complaint	107183L3	6	5-125	329	Customer Relationship Management	Level 3	Deal with customer complaints	111272L3	6	The UoC title is revised.
Investigate online customer satisfaction	107184L3	6	5-126	330	Customer Relationship Management	Level 3	Investigate customer satisfaction	111273L3	6	The UoC title is revised.
In-depth investigation of online customer needs	107185L4	6	5-127	331						
Manage online customer information	107186L4	6	5-128	332						
Maintain and improve online customer relationship strategy	107187L5	12	5-129	333	Customer Relationship Management	Level 5	Maintain and improve customer relationship strategy	111276L5	6	The UoC title is revised. The QF credit is adjusted from 12 to 6.
Explore potential requirements of online customers	107188L5	6	5-130	334	Customer Relationship Management	Level 5	Explore potential requirements of customers	111277L5	6	The UoC title is revised.
Apply technology to support customer relationship management	107189L5	6	5-131	335	Customer Relationship Management	Level 5	Apply technology to support customer relationship management	111278L5	6	
Manage user-generated content	107190L5	6	5-132	336						
Analyze, plan and optimize CRM system	107191L5	12	5-133	337	Customer Relationship Management	Level 5	Analyse, plan and optimise Customer Relationship Management system	111279L5	6	The UoC title is revised. The QF credit is adjusted from 12 to 6.
Manage business partner relationship	107192L6	6	5-134	338	Customer Relationship Management	Level 6	Manage business partner relationship	111280L6	6	
Manage the customers of competitors	107193L6	6	5-135	339						

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Evaluate software system sales data	107194L3	6	5-136	340						
Analyze website traffic	107195L3	3	5-137	341	Data Analytics	Level 3	Perform website traffic analytics	111389L3	3	The UoC title is revised.
Analyze website traffic time	107196L3	3	5-138	342	Data Analytics	Level 3	Perform website traffic time analytics	111390L3	3	The UoC title is revised.
Analyze website visitors	107197L3	3	5-139	343	Data Analytics	Level 3	Perform website visitor analytics	111391L3	3	The UoC title is revised.
Analyze search engine	107198L3	3	5-140	344	Data Analytics	Level 3	Perform search engine analytics	111392L3	3	The UoC title is revised.
Analyze customer order	107199L3	3	5-141	345	Data Analytics	Level 3	Perform customer order analytics	111393L3	3	The UoC title is revised.
Analyze website data and prepare report	107200L4	6	5-142	346	Data Analytics	Level 4	Analyse website data and prepare report	111394L4	6	
Analyze customers purchase patterns	107201L5	12	5-143	347	Data Analytics	Level 5	Analyse customers' purchase patterns	111395L5	6	The UoC title is revised. The QF credit is adjusted from 12 to 6.
Apply A/B test to evaluate and enhance website effectiveness	107202L6	6	5-144	348						
Manage and operate online social media applications	107203L2	6	5-145	349						
Apply webpage authoring program for front-end development	107204L3	6	5-146	350						
Create multimedia content	107205L3	6	5-147	351						
Apply HTML5 technology	107206L3	6	5-148	352						
Apply XML technology	107207L3	6	5-149	353						
Understand and establish website prototype	107208L3	6	5-150	354						
Master dynamic webpage design language	107209L4	6	5-151	355						
Master semantic web language	107210L4	6	5-152	356						
Master the framework and architecture of website development	107211L4	6	5-153	357						
Master the design and application of database	107212L4	6	5-154	358						
Apply cloud computing and relevant technology	107213L4	6	5-155	359						
Master the design and development of mobile device applications	107214L4	6	5-156	360						
Master mobile payment services	107215L4	6	5-157	361	Information Technology	Level 4	Master mobile payment services	111416L4	6	
Master the application technology development of Java Platform Enterprise Edition	107216L5	6	5-158	362						
Analyze business data	107217L5	6	5-159	363	Data Analytics	Level 5	Analyse business data	111396L5	6	
Master the Internet of Things development technology	107218L5	6	5-160	364						
Master the Radio Frequency Identification development technology	107219L5	6	5-161	365						
Master the design of distributed system	107220L5	6	5-162	366						
Master the framework and tools for mobile device application development	107221L5	6	5-163	367						
Manage and monitor the outsourcing partners for website design and development	107222L5	3	5-164	368						
Plan the function and overall contents of website	107223L6	6	5-165	369						
Design and setup software systems	107224L6	6	5-166	370						
Develop solutions for mobile payment	107225L6	6	5-167	371						
Handle daily backup and maintenance of server	107226L2	3	5-168	372	Information Technology	Level 2	Handle daily backup and maintenance of server	111401L2	3	
Manage and monitor the webpage server	107227L3	6	5-169	373	Information Technology	Level 3	Manage and monitor the webpage server	111407L3	6	

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Handle the software and hardware problems of server	107228L4	6	5-170	374	Strategic and ESG Management	Level 6	Understand the legal knowledge of network transaction safety	111234L6	6	
Evaluate and select appropriate server	107229L4	6	5-171	375						
Master and apply the server cluster technology	107230L5	6	5-172	376						
Master and apply information storage technology	107231L5	6	5-173	377						
Design and develop e-business system application server and network architecture solutions	107232L5	6	5-174	378						
Apply encryption technology to send data	107233L4	12	5-175	379						
Apply authentication technology and security certification agreement	107234L4	6	5-177	380						
Master computer virus detection and prevention technology	107235L4	6	5-178	381						
Apply network identity technology	107236L4	6	5-179	382						
Master privacy and management techniques	107237L4	6	5-180	383						
Apply Firewall technology	107238L4	6	5-181	384						
Manage Virtual Private Network (VPN) technology	107239L4	6	5-182	385						
Develop website security overall planning solution	107240L5	6	5-183	386						
Understand the legal knowledge of network transaction safety	107241L6	6	5-184	387						
Master server monitoring technology	107242L4	6	5-185	388						
Understand the legal knowledge of network transaction safety	107243L4	6	5-186	389						
Implement website content testing	107244L4	6	5-187	390						
Implement webpage function testing	107245L4	6	5-188	391						
Implement webpage usability testing	107246L4	6	5-189	392						
Implement integration and interface testing	107247L4	6	5-190	393						
Implement browser compatibility testing	107248L4	6	5-191	394						
Implement database testing	107249L4	6	5-192	395						
Implement safety testing	107250L5	6	5-193	396						
Implement server communication testing	107251L5	6	5-194	397						
Implement website performance testing	107252L5	6	5-195	398						
Implement system integration testing	107253L5	6	5-196	399						
Design automatic system testing architecture	107254L6	6	5-197	400						
Apply basic knowledge of accounting	107255L3	6	5-198	401						
Apply knowledge of accounting	107256L4	6	5-199	402						
Monitor financial investment management	107257L4	6	5-200	403						
Apply financial management and statistical analysis software system	107258L4	3	5-201	404						
Improve the daily accounting process of e-business	107259L4	6	5-202	405						
Monitor financial accounting system	107260L4	3	5-203	406						
Master the relevant tasks and functions of financial management	107261L5	6	5-204	407						
Manage the fund raising for corporate	107262L5	6	5-205	408						

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Manage corporate project investment	107263L5	6	5-206	409	Strategic and ESG Management	Level 5	Manage corporate costs	111228L5	6	
Manage corporate costs	107264L5	6	5-207	410			Manage corporate surplus	111229L5	6	
Manage corporate surplus	107265L5	6	5-208	411		Level 5				
Establish financial management software system architecture	107266L6	3	5-209	412						
Establish corporate e-business financial department structure	107267L6	3	5-210	413						
Optimize the structure of e-business finance department	107268L6	3	5-211	414						
Apply the labor legislation relating to e-business corporate	107269L3	3	5-212	415						
Build e-business team	107270L4	3	5-213	416						
Develop staff reward and punishment management	107271L5	3	5-214	417						
Apply performance appraisal quantification process	107272L5	3	5-215	418						
Apply method to improve team execution capacity	107273L5	6	5-216	419	Human Resource Management & Development	Level 5	Apply methods to improve team execution capacity	111387L5	6	The UoC title is revised.
Develop job positions for e-business corporate	107274L6	3	5-217	420						
Assess the talent needs of e-business corporate	107275L6	3	5-218	421						
Develop of e-business human resources management system	107276L6	6	5-219	422						
Plan e-business corporate human resources	107277L6	3	5-220	423						
Establish e-business corporate culture	107278L7	6	5-221	424						
Analyze the needs of online customers	107279L3	12	5-222	425						
Enhance online sales performance strategy and skills	107280L3	6	5-223	426						
Understand the processes and methods of developing marketing plans	107281L4	6	5-224	427						
Apply marketing techniques and negotiation strategies for significant clients	107283L4	12	5-225	428						
Establish e-business marketing performance management system	107284L4	12	5-227	429						
Apply low-cost marketing strategy	107282L5	6	5-229	430						
Design e-business model	107285L5	6	5-230	431						
Establish online marketing team	107286L5	6	5-231	432						
Audit corporate online marketing plan	107287L6	6	5-232	433						
Control online marketing	107288L6	12	5-233	434						
Provide support and advice to customers	107123L2	6	5-13			Level 2	Provide support and advice to customers		6	Deleted due to duplication of 105071L1 (although the application scope, level and credits are different)
Receive customers	107124L2	6	5-14			Level 2	Receive customers		6	Deleted due to duplication of 105072L1 (although the application scope, level and credits are different)
Comply with professional ethics and employee code of practice	107125L2	3	5-15			Level 2	Comply with professional ethics and employee code of practice		3	Deleted due to duplication of 105073L1 (although the application scope and level are different)

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Establish customer relationships	107126L2	3	5-16			Level 2	Establish customer relationships		3	Deleted due to duplication of 105074L2 (although the application scope is different)
Apply good communication skills to facilitate transactions	107127L2	3	5-17			Level 2	Apply good communication skills to facilitate transactions		3	Deleted due to duplication of 105075L2 (although the application scope is different)
Perform quality customer service plan	107128L3	6	5-20			Level 3	Perform quality customer service plan		6	Deleted due to duplication of 105076L3 (although the application scope is different)
Review products and services to maintain customer satisfaction	107131L4	3	5-23			Level 4	Review products and services to maintain customer satisfaction		3	Deleted due to duplication of 105080L4 (although the application scope is different)
Manage mystery shopper activity	107132L4	6	5-24			Level 4	Manage mystery shopper activity		6	Deleted due to duplication of 105081L4 (although the application scope and credit are different)
Review customer service	107133L4	6	5-26			Level 4	Review customer service		6	Deleted due to duplication of 105082L4 (although the application scope is different)
Develop customer service performance guidelines	107134L5	3	5-28			Level 5	Develop customer service performance guidelines		3	Deleted due to duplication of 105083L5 (although the application scope is different)
Establish customer service plan	107135L5	3	5-29			Level 5	Establish customer service plan		3	Deleted due to duplication of 105085L5 (although the application scope is different)
Develop Customer Relationship Management (CRM) strategy	107136L6	6	5-30			Level 6	Develop Customer Relationship Management (CRM) strategy		6	Deleted due to duplication of 105086L6 (although the application scope is different)
Develop Customer Services Management (CSM) strategy	107137L6	6	5-32			Level 6	Develop Customer Services Management (CSM) strategy		6	Deleted due to duplication of 105087L6 (although the application scope is different)
				New 1	Merchandising / E-commerce Merchandising	Level 5	Research and analyse the latest life trends and design trends; plan, design and implement creative visual merchandising strategies	111294L5	4	
				New 2	Sales, Marketing and Multi-channel Sales Management	Level 4	Implement sales team incentive plans	111257L4	3	
				New 3	Sales, Marketing and Multi-channel Sales Management	Level 3	Make use of technology to enhance creativity and efficiency	111249L3	3	
				New 4	Customer Services	Level 4	Lead the team to adapt to the renewal and change of the technology system	111337L4	4	
				New 5	Customer Services	Level 3	Manage customer service performance of frontline staff	111334L3	3	
				New 6	Customer Services	Level 4	Oversee the channels for collecting customer opinions and analyse the opinions	111338L4	4	
				New 7	Strategic and ESG Management	Level 6	Develop risk management policies and procedures related to intellectual property (IP)	111235L6	4	
				New 8	Strategic and ESG Management	Level 4	Promote public relations crisis management policy	111226L4	4	
				New 9	Strategic and ESG Management	Level 3	Implement public relations crisis management policy	111222L3	4	
				New 10	Strategic and ESG Management	Level 2	Assist in protecting intellectual property (IP)	111220L2	1	

Appendix 2: Cross Reference Table for Different Versions of Retail Industry - Recognition of Prior Learning (RPL) Clusters of Units of Competency

Retail Industry - Recognition of Prior Learning (RPL) Clusters of Units of Competency											In Specification of Competency Standards for the Retail Industry 2.0							
Ref. No.	Code of RPL Cluster	Cluster Name	The Basic Core Competencies Include	Level	UoC Title	UoC Code	Working Experience	Credit	Total Credit	Method of Recognition	Assessment Method	UoC Title	UoC Code	Working Experience	Credit	Total Credit	Method of Recognition	Assessment Method
1	REZZAA1A	Sales and Marketing	The basic core competencies include: able to master self-quality management and complete preparation work for commodities display. Understand knowledge of servicing customer. Servicing customer professionally and curtesy plus provide support and advice to customer efficiency.	1	Preparations for commodity display*	105038L1	One year experience in retail industry	3	12	Verification of Documents and Working Experience	Interview	Prepare for commodity display	111237L1	One year experience in retail industry	3	12	Verification of Documents and Working Experience	Interview
					Self-quality management	105039L1		3	Practise self-quality management			111238L1		3				
					Provide support and advice to customers*	105071L1		3	Provide support and advice to customers			111327L1		3				
					Serve customers	105072L1		3	Serve customers			111328L1		3				
2	REZZAA2A	Sales and Marketing	The basic core competencies include: collect market information and perform customer classification. Perform supporting job related to media creation. Understand customer loyalty programme, promote the programme to customer, assist customer complete the application procedures and establish a good relationship with customers.	2	Collect market information*	105040L2	Three years experience in retail industry, of which not less than two years of relevant working experience	3	24	Verification of Documents and Working Experience	Interview	Collect market information	111239L2	Three years experience in retail industry, of which not less than two years of relevant working experience	3	24	Verification of Documents and Working Experience	Interview
					Create media kits	105041L2		6	Produce slides / presentation materials and media kits in line with corporate branding			111240L2		6				
					Perform customer classification	105042L2		6	Perform customer classification			105042L2		6				
					Promote loyalty programmes to customers	105043L2		6	Promote loyalty programmes to customers			111241L2		6				
					Build up relationship with customers*	105074L2		3	Build up relationship with customers			111329L2		3				
3	REZZAA3A	Sales and Marketing	The basic core competencies include: understand brand promotion, product recall, advertising, promotional activities, sales plan, sales training, online marketing communication and retail pricing as well as implement relevant strategies, plan and activities.	3	Implement brand promotion strategies*	105044L3	Five years experience in retail industry, of which not less than three years of relevant working experience	6	42	Verification of Documents and Working Experience	Interview	Implement strategies for brand promotion and multi-channel sales management	111242L3	Five years experience in retail industry, of which not less than three years of relevant working experience	6	42	Verification of Documents and Working Experience	Interview
					Implement product recall	105045L3		6	Implement product recall			105045L3		6				
					Implement advertising and promotional activities*	105046L3		6	Implement advertising and promotional activities			111243L3		6				
					Implement a sales plan*	105047L3		6	Implement a sales plan			111244L3		6				
					Provide basic sales training	105048L3		6	Provide basic sales training			105048L3		6				
					Carry out online market communication*	105049L3		6	Carry out online market communication			105049L3		6				
					Implement pricing strategies*	105050L3		6	Implement pricing strategies			105050L3		6				
4	REZZAA4A	Sales and Marketing	The basic core competencies include: implement a market research plan and monitor marketing activities. Plan online marketing communication, implement advertising promotion and environmental sales. Manage goods promotional activities. lead	4	Lead a sales team*	105051L4	Six years experience in retail industry, of which not less than four years of relevant working experience	6	39	Verification of Documents and Working Experience AND Interview	-	Build and lead a sales team	111250L4	Six years experience in retail industry, of which not less than four years of relevant working experience	6	39	Verification of Documents and Working Experience AND Interview	-
					Implement a market research proposal*	105052L4		6	Implement a market research proposal			111251L4		6				
					Implement and monitor marketing activities*	105053L4		6	Implement and monitor marketing activities			111252L4		6				

Remarks: * Core competencies

UoC from "Specification of Competency Standards (SCS)" for the Information Communications Technology Industry

Ref. No.	Code of RPL Cluster	Cluster Name	The Basic Core Competencies Include	Level	UoC Title	UoC Code	Working Experience	Credit	Total Credit	Method of Recognition	Assessment Method	UoC Title	UoC Code	Working Experience	Credit	Total Credit	Method of Recognition	Assessment Method
			good promotional activities to the sales team and monitor sales performance.		Monitor sales performance of goods*	105054L4		3				Monitor sales performance of goods	105054L4		3			
					Manage goods promotional activities*	105055L4		6				Manage goods promotional activities	111253L4		6			
					Plan online market communication	105056L4		3				Plan online multi-channel marketing communications	111254L4		3			
					Implement advertising strategies	105057L4		3				Implement advertising strategies	111255L4		3			
					Implement environmental sales strategies	105058L4		6				Implement environmental sales strategies	105058L4		6			
5	REZZBA1A	Customer Services	The basic core competencies include: able to master self-personality traits, build a good self-image as well as comply with professional ethics and staff code of practice. Serve customers according to established procedures and provide support and advice to customers.	1	Provide support and advice to customers*	105071L1	One year experience in retail industry	3	12	Verification of Documents and Working Experience	Interview	Provide support and advice to customers	111327L1	One year experience in retail industry	3	12	Verification of Documents and Working Experience	Interview
					Serve customers*	105072L1		3				Serve customers	111328L1		3			
					Comply with professional ethics and staff code of practice	105073L1		3				Comply with professional ethics and staff code of practice	105073L1		3			
					Self-quality management	105039L1		3				Practise self-quality management	111238L1		3			
6	REZZBA2A	Customer Services	The basic core competencies include: build up relationship with customers and use good communication skills to facilitate transactions.	2	Build up relationship with customers*	105074L2	Three years experience in retail industry, of which not less than two years of relevant working experience	3	6	Verification of Documents and Working Experience	Interview	Build up relationship with customers	111329L2	Three years experience in retail industry, of which not less than two years of relevant working experience	3	6	Verification of Documents and Working Experience	Interview
					Use good communication skills to facilitate transactions*	105075L2		3				Use good communication skills to facilitate transactions	111330L2		3			
7	REZZBA3A	Customer Services	The basic core competencies include: master consumer psychology and behaviour, compile customer relationship management system data, implement quality customer service scheme and handle customer's complaints.	3	Implement quality customer service scheme*	105076L3	Five years experience in retail industry, of which not less than three years of relevant working experience	6	15	Verification of Documents and Working Experience	Interview	Implement quality customer service scheme	111331L3	Five years experience in retail industry, of which not less than three years of relevant working experience	6	15	Verification of Documents and Working Experience	Interview
					Compile customer relationship management (CRM) system data*	105077L3		3				Compile customer relationship management (CRM) system data	105077L3		3			
					Master consumer psychology and behaviour*	105078L3		3				Master consumer psychology and behaviour	111332L3		3			
					Handle customers' complaints*	105079L3		3				Handle customers' complaints	111333L3		3			
8	REZZBA4A	Customer Services	The basic core competencies include: master consumer psychology and behaviour, compile customer relationship management system data, implement quality customer service scheme and handle customer's complaints.	4	Review products and services to maintain customer satisfaction level*	105080L4	Six years experience in retail industry, of which not less than four years of relevant working experience	3	12	Verification of Documents and Working Experience AND Interview	-	Review products and services to maintain customer satisfaction level	111335L4	Six years experience in retail industry, of which not less than four years of relevant working experience	3	12	Verification of Documents and Working Experience AND Interview	-
					Manage mystery shopper activities	105081L4		3				Manage mystery shopper activities	105081L4		3			
					Review customer service scheme	105082L4		6				Review customer service scheme	111336L4		6			
9	REZZCA2A	Human Resource Management & Development	The basic core competencies include: understand and apply general labour regulation and occupational	2	Apply related occupational safety and health regulations	104999L1	Three years experience in retail industry, of which not less than two	3	24	Verification of Documents and Working Experience	Interview	Apply related occupational safety and health regulations	104999L1	Three years experience in retail industry, of which not less than two	3	24	Verification of Documents and Working Experience	Interview

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10			safety and health regulations, record and verify staff attendance information and handle payroll.		Record and verify staff attendance information*	105000L2	years of relevant working experience	6				Record and verify staff attendance information	111371L2	years of relevant working experience	6				
					Handle staff records*	105001L2	3	Handle staff records				111372L2	3						
					Apply general labour regulations*	105002L2	6	Apply general labour regulations				111373L2	6						
					Handle salary payment*	105010L3	6	Handle salary payment				105010L3	6						
	REZZCB3A	Human Resource Management & Development (Recruitment and Benefit)	The basic core competencies include: recruit and select personnel according to the organization's guidelines and implement staff appraisal policy.	3	Recruit and select personnel*	105003L3	Five years experience in retail industry, of which not less than three years of relevant working experience	3	6	Verification of Documents and Working Experience	Interview	Recruit and select personnel	111374L3	Five years experience in retail industry, of which not less than three years of relevant working experience	3	6	Verification of Documents and Working Experience	Interview	
		Implement staff appraisal policy*	105011L3		3			3	Implement staff appraisal policy	111379L3									
11	REZZCC3A	Human Resource Management & Development (Personnel Management)	The basic core competencies include: understand and implement human resources policies, implement and promote equality policy and handle staff complaints.	3	Handle staff complaints*	105004L3	Five years experience in retail industry, of which not less than three years of relevant working experience	3	12	Verification of Documents and Working Experience	Interview	Handle staff complaints	111375L3	Five years experience in retail industry, of which not less than three years of relevant working experience	3	12	Verification of Documents and Working Experience	Interview	
					Implement human resources policies*	105008L3	3	Implement human resources policies				111377L3	3						
					Promote equality policy	105009L3	6	Promote equality policy				111378L3	6						
12	REZZCD3A	Human Resource Management & Development (Training & Development)	The basic core competencies include: understand and arrange product training plus provide in-service and soft skills training.	3	Arrange product training	105005L3	Five years experience in retail industry, of which not less than three years of relevant working experience	3	9	Verification of Documents and Working Experience	Interview	Arrange product training	105005L3	Five years experience in retail industry, of which not less than three years of relevant working experience	3	9	Verification of Documents and Working Experience	Interview	
					Provide in-service training*	105006L3	3	Provide in-service training				111376L3	3						
					Arrange soft skills training*	105007L3	3	Arrange soft skills training				105007L3	3						
13	REZZCA4A	Human Resource Management & Development	The basic core competencies include: understand and formulate staff working guidelines according to the operating strategies and resources of the organization, manage the human resources information system, handle staff benefits and dispute, analyze training need as well as develop staff training and development programmes.	4	Formulate staff working guidelines	105013L4	Six years experience in retail industry, of which not less than four years of relevant working experience	3	21	Verification of Documents and Working Experience AND Interview	-	Formulate staff working guidelines	105013L4	Six years experience in retail industry, of which not less than four years of relevant working experience	3	21	Verification of Documents and Working Experience AND Interview	-	
					Handle staff remuneration and benefits*	105016L4	6	Handle staff remuneration and benefits				111384L4	6						
					Manage the human resources information system	105012L4	3	Manage the human resources information system				111381L4	3						
					Handle general labour disputes*	105015L4	6	Handle general labour disputes				111383L4	6						
					Analyse training need and develop staff training and development programmes*	105014L4	3	Analyse training needs and develop staff training and development programmes				111382L4	3						
14	REZZDA1A	Merchandising and Supply Chain Management (Purchasing)	The basic core competencies include: able to handle commonly-used shipping documents and receive goods for storage accordance with the procedures.	1	Handle commonly-used shipping documents*	104956L1	One year experience in retail industry	3	6	Verification of Documents and Working Experience	Interview	Handle commonly-used shipping documents	111297L1	One year experience in retail industry	3	6	Verification of Documents and Working Experience	Interview	
					Receive goods for storage	104957L1	3	Receive goods for storage				111298L1	3						
15	REZZDA2A	Merchandising and Supply Chain Management (Purchasing)	The basic core competencies include: understand and be able to handle trade documents and arrange goods delivery plus handle	2	Handle trade documents*	104959L2	Three years experience in retail industry, of which not less than two years of relevant	6	15	Verification of Documents and Working Experience	Interview	Handle trade documents	111281L2	Three years experience in retail industry, of which not less than two years of relevant	6	15	Verification of Documents and Working Experience	Interview	
					Implement goods delivery *	104960L2	6	Implement goods delivery				111300L2	6						

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16	REZZDA3A	Merchandising and Supply Chain Management (Purchasing)	The basic core competencies include: understand import and export related knowledge, implement the import and export of goods, perform purchase and quality control.	3	Handle payments for purchases	104962L2	working experience	3	24	Verification of Documents and Working Experience	Interview	Handle payments for purchases	111282L2	working experience	3	24	Verification of Documents and Working Experience	Interview
					Implement the purchase*	104963L3	Five years experience in retail industry, of which not less than three years of relevant working experience	6				Implement the purchase	111283L3	Five years experience in retail industry, of which not less than three years of relevant working experience	6			
					Implement the import and export of goods	104964L3		3				Implement the import and export of goods	111302L3		3			
					Introduce products	104970L3		6				Introduce products	111284L3		6			
					Buy goods*	104971L3		6				Buy goods	111285L3		6			
					Implement quality control of goods*	104972L3		3				Implement quality control of goods	111286L3		3			
17	REZZDA4A	Merchandising and Supply Chain Management (Purchasing)	The basic core competencies include: understand import and export related knowledge, implement the import and export of goods, perform purchase and quality control.	4	Handle problems with suppliers*	104978L4	Six years experience in retail industry, of which not less than four years of relevant working experience	6	18	Verification of Documents and Working Experience AND Interview	-	Handle problems with suppliers	111287L4	Six years experience in retail industry, of which not less than four years of relevant working experience	6	18	Verification of Documents and Working Experience AND Interview	-
					Establish partnerships with suppliers*	104979L4		6				Establish partnerships with suppliers	111288L4		6			
					Import goods	104980L4		6				Import goods	111289L4		6			
18	REZZEA1A	Merchandising and Supply Chain Management (logistics / warehouse)	The basic core competencies include: know how to handle commonly-used shipping documents, received goods for storage accordance with the procedures and package goods in distribution centres.	1	Handle commonly-used shipping documents*	104956L1	One year experience in retail industry	3	12	Verification of Documents and Working Experience	Interview	Handle commonly-used shipping documents	111297L1	One year experience in retail industry	3	12	Verification of Documents and Working Experience	Interview
					Receive goods for storage*	104957L1		3				Receive goods for storage	111298L1		3			
					Handle commonly-used shipping documents*	104958L1		6				Handle commonly-used shipping documents	111299L1		6			
19	REZZEA2A	Merchandising and Supply Chain Management (logistics / warehouse)	The basic core competencies include: arrange goods delivery and received returned goods in distribution centre.	2	Implement goods delivery *	104960L2	Three years experience in retail industry, of which not less than two years of relevant working experience	6	9	Verification of Documents and Working Experience	Interview	Implement goods delivery	111300L2	Three years experience in retail industry, of which not less than two years of relevant working experience	6	9	Verification of Documents and Working Experience	Interview
					Receive returned goods in distribution centres*	104961L2		3				Receive returned goods in distribution centres	111301L2		3			
20	REZZEA3A	Merchandising and Supply Chain Management (logistics / warehouse)	The basic core competencies include: implement retail inventory management including monitor the inventory level, manage the product distribution process, delivery of goods, arrange maintenance and repair for transportation means as well as the implementation of health management measures.	3	Supervise the delivery of goods*	104965L3	Five years experience in retail industry, of which not less than three years of relevant working experience	6	33	Verification of Documents and Working Experience	Interview	Supervise the delivery of goods	111303L3	Five years experience in retail industry, of which not less than three years of relevant working experience	6	33	Verification of Documents and Working Experience	Interview
					Supervise the product distribution process*	104966L3		6				Supervise the product distribution process	111304L3		6			
					Implement logistic safety and health management measures	104967L3		3				Implement logistic safety and health management measures	111305L3		3			
					Monitor the inventory level to meet the demand*	104968L3		3				Monitor the inventory level to meet the demand	111306L3		3			
					Implement inventory procedures*	104969L3		6				Implement inventory procedures	111307L3		6			
					Arrange maintenance and repair for transportation means*	104973L3		3				Arrange maintenance and repair for transportation means	111308L3		3			
					Perform retail inventory management*	104974L3		6				Perform retail inventory management	111309L3		6			

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21	REZZEA4A	Merchandising and Supply Chain Management (logistics / warehouse)	The basic core competencies include: manage inventory, provide logistic support, implement logistics management business continuity plan and e-commerce logistics operating procedures.	4	Implement e-commerce logistics operating procedures	104975L4	Six years experience in retail industry, of which not less than four years of relevant working experience	6	24	Verification of Documents and Working Experience AND Interview	-	Implement e-commerce logistics operating procedures	111310L4	Six years experience in retail industry, of which not less than four years of relevant working experience	6	24	Verification of Documents and Working Experience AND Interview	-
					Implement logistics management business continuity plans	104976L4		6				Implement logistics management business continuity plans	111311L4		6			
					Manage inventory*	104977L4		6				Manage inventory	111312L4		6			
					Provide logistic support	104981L4		6				Provide logistic support	111313L4		6			
22	REZZFA2A	Information Technology	The basic core competencies include: operate IT equipment/systems for retail business, provide retail reports, correct use of a variety of network media and sales skills for online sales, retain online customers and undertake general administrative work for accounts services.	2	Operate IT equipment / systems for retail business*	105088L2	Three years experience in retail industry, of which not less than two years of relevant working experience	3	15	Verification of Documents and Working Experience	Interview	Operate IT equipment / systems for retail business	111398L2	Three years experience in retail industry, of which not less than two years of relevant working experience	3	15	Verification of Documents and Working Experience	Interview
					Provide retail reports	105089L2		3				Provide retail reports	105089L2		3			
					Retain online customers	105090L2		3				Retain online customers	111399L2		3			
					Conduct online sales	105091L2		3				Conduct online sales	111400L2		3			
					Undertake general administrative work for accounts services**	100221L2		3				Undertake general administrative work for accounts services	111397L2		3			
23	REZZFA3A	Information Technology	The basic core competencies include: understand and repair IT equipment/systems, manage online shopping, brand, sales system, payment system inventory, business supply chain and customer profile as well as activity record.	3	Repair IT equipment / systems*	105092L3	Five years experience in retail industry, of which not less than three years of relevant working experience	3	34	Verification of Documents and Working Experience	Interview	Repair IT equipment / systems	111403L3	Five years experience in retail industry, of which not less than three years of relevant working experience	3	34	Verification of Documents and Working Experience	Interview
					Manage online brands	105093L3		6				Manage online brands	111404L3		6			
					Manage online sales system*	105094L3		3				Manage online sales system	111410L4		3			
					Manage online payment systems	105095L3		6				Manage online payment systems	105095L3		6			
					Manage online shopping	105096L3		3				Manage online shopping	111405L3		3			
					Manage online inventory	105097L3		6				Manage online inventory	111406L3		6			
					Manage online business supply chain	105098L3		3				Manage online business supply chain	105098L3		3			
					Manage customer profile and activity record**	100223L3		4				Handle customer profile and activity record	111402L3		4			
24	REZZFA4A	Information Technology	The basic core competencies include: determine the equipment needed for retail operations, deploy information technology equipment/systems for retail operation, incorporate and fine-tune strategic proposals by other organisations such as outsourcing party, use mobile technologies to improve sales service, implement e-retail business model and manage online commercial risks. Manage and perform service, operate and manage the data efficiency and effective.	4	Set up IT equipment needed for retail operations*	105099L4	Six years experience in retail industry, of which not less than four years of relevant working experience	3	41	Verification of Documents and Working Experience AND Interview	-	Set up IT equipment needed for retail operations	111411L4	Six years experience in retail industry, of which not less than four years of relevant working experience	3	41	Verification of Documents and Working Experience AND Interview	-
					Deploy information technology equipment / systems for retail operations*	105100L4		3				Deploy information technology equipment / systems for retail operations	111412L4		3			
					Use mobile technologies to improve sales service	105101L4		6				Use mobile technologies to improve sales service	111413L4		6			
					Implement e-retail business model*	105102L4		6				Implement e-retail business model	111414L4		6			
					Manage online commercial risks	105103L4		6				Manage online commercial risks	111415L4		6			

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25	REZZGA4A	Strategic Management	The basic core competencies include: comply with business law, implement business plan, audit loss and loss prevention policies.	4	Incorporate and fine-tune strategic proposals by other organisations such as outsourcing party#	100228L4		3				Incorporate and fine-tune the proposals by other organisations such as outsourcing party	111408L4		3			
					Deliver the database operations services*#	100536L4		14				Deliver the database operations services	111409L4		14			
					Comply with business laws*	105020L3	Six years experience in retail industry, of which not less than four years of relevant working experience	6	24	Verification of Documents and Working Experience, Written Test, AND Interview	-	Comply with business laws	111221L3	Six years experience in retail industry, of which not less than four years of relevant working experience	6	24	Verification of Documents and Working Experience, Written Test, AND Interview	-
					Implement business plan	105021L4		6				Implement business plan	111223L4		6			
					Audit loss prevention policies*	105022L4		6				Audit loss prevention policies	111224L4		6			
26	REZZHA1A	Store Operation	The basic core competencies include: commit to daily work of the retail team with a cooperative attitude, implement hygiene and age restricted goods selling procedures.	1	Manage budget and financial plan*	105023L4		6				Manage budget and financial plan	111225L4		6			
					Implement hygiene procedures*	105116L1	One year experience in retail industry	3	9	Verification of Documents and Working Experience	Interview	Implement hygiene procedures	111344L1	One year experience in retail industry	3	9	Verification of Documents and Working Experience	Interview
					Implement procedures for the sale of age restricted goods*	105117L1		3				Implement procedures for the sale of age restricted goods	105117L1		3			
					Commit to the work of the retail team	105124L2		3				Commit to the work of the retail team	111347L2		3			
27	REZZHB2A	Store Operation (Handling Goods)	The basic core competencies include: process order, deal with cash and credit card payment, retail sales system clearing, pack goods, replenish shelves, handle damageable goods, delivery and handle goods return.	2	Perform retail sales system clearing*	105119L2	Three years experience in retail industry, of which not less than two years of relevant working experience	3	30	Verification of Documents and Working Experience	Interview	Perform retail sales system clearing	111345L2	Three years experience in retail industry, of which not less than two years of relevant working experience	3	30	Verification of Documents and Working Experience	Interview
					Replenish shelves*	105120L2		3				Replenish shelves	111346L2		3			
					Pack goods	105121L2		3				Pack goods	105121L2		3			
					Handle goods delivery*	105122L2		3				Handle goods delivery	105122L2		3			
					Handle goods return*	105123L2		6				Handle goods return	105123L2		6			
					Handle damageable goods	105126L2		3				Handle damageable goods	105126L2		3			
					Process orders*	105127L2		3				Process orders	111348L2		3			
					Handle cash and credit card transaction payment*	105128L2		6				Handle cash and credit card transaction payment	111349L2		6			
28	REZZHC2A	Store Operation (Cleaning and Maintenance / Repair)	The basic core competencies include: implement work safety guidelines and keep the retail environment clean and tidy.	2	Implement work safety guidelines	105129L2	Three years experience in retail industry, of which not less than two years of relevant working experience	6	9	Verification of Documents and Working Experience	Interview	Implement work safety guidelines	111350L2	Three years experience in retail industry, of which not less than two years of relevant working experience	3	6	Verification of Documents and Working Experience	Interview
					Keep the retail environment clean and tidy*	105130L2		3				Keep the retail environment clean and tidy	111351L2		3			
29	REZZHB3A	Store Operation (Handling Goods)	The basic core competencies include: implement goods classification, perform the procedures for store inventory control, implement product recall and use the retail sales system.	3	Perform the procedures for store inventory control*	105118L2	Five years experience in retail industry, of which not less than three years of relevant working experience	6	21	Verification of Documents and Working Experience	Interview	Perform the procedures for store inventory control	105118L2	Five years experience in retail industry, of which not less than three years of relevant working experience	6	21	Verification of Documents and Working Experience	Interview
					Implement product recall	105045L3		6				Implement product recall	105045L3		6			
					Set up goods classification	105136L3		6				Set up goods classification	111355L3		6			

Ref. No.	Code of RPL Cluster	Cluster Name	The Basic Core Competencies Include	Level	UoC Title	UoC Code	Working Experience	Credit	Total Credit	Method of Recognition	Assessment Method	UoC Title	UoC Code	Working Experience	Credit	Total Credit	Method of Recognition	Assessment Method
					Use the retail sales system*	105138L3		3				Use the retail sales system	111356L3		3			
30	REZZHD3A	Store Operation (Merchandise Display)	The basic core competencies include: implement store design plan, implement and manage commodity and store displays.	3	Implement store design plan	105131L3	Five years experience in retail industry, of which not less than three years of relevant working experience	6	18	Verification of Documents and Working Experience	Interview	Implement store design plan	111352L3	Five years experience in retail industry, of which not less than three years of relevant working experience	6	18	Verification of Documents and Working Experience	Interview
					Implement commodity display*	105140L3		6				Implement commodity display	111357L3		6			
					Manage store displays*	105152L4		6				Manage store displays	111364L4		6			
31	REZZHE3A	Store Operation (Risk and Security Management)	The basic core competencies include: implement theft prevention, measures against loss of goods, implement shop security and able to identify and watch suspicious customers as well as implement first aid procedures.	3	Prevent theft*	105125L2	Five years experience in retail industry, of which not less than three years of relevant working experience	3	18	Verification of Documents and Working Experience	Interview	Prevent theft	105125L2	Five years experience in retail industry, of which not less than three years of relevant working experience	3	18	Verification of Documents and Working Experience	Interview
					Implement shop security procedures*	105132L3		3				Implement shop security procedures	111353L3		3			
					Implement first aid procedures	105134L3		3				Implement first aid procedures	105134L3		3			
					Identify and watch suspicious customers	105135L3		3				Identify and watch suspicious customers	105135L3		3			
					Implement preventive measures against loss of good*	105137L3		6				Implement preventive measures against loss of good	105137L3		6			
32	REZZHB4A	Store Operation (Handling Goods)	The basic core competencies include: manage the financial resources of the retail store and inventory.	4	Manage the financial resources of the retail store	105149L4	Six years experience in retail industry, of which not less than four years of relevant working experience	6	12	Verification of Documents and Working Experience AND Interview	-	Manage the financial resources of the retail store	111362L4	Six years experience in retail industry, of which not less than four years of relevant working experience	6	12	Verification of Documents and Working Experience AND Interview	-
					Manage retail store inventory*	105151L4		6				Manage retail store inventory	111363L4		6			
33	REZZHC4A	Store Operation (Cleaning and Maintenance / Repair)	The basic core competencies include: manage store facilities and repairs, manage and maintain workplace and monitor repair services.	4	Manage store facilities and repair	105139L3	Six years experience in retail industry, of which not less than four years of relevant working experience	6	18	Verification of Documents and Working Experience AND Interview	-	Manage store facilities and repair	105139L3	Six years experience in retail industry, of which not less than four years of relevant working experience	6	18	Verification of Documents and Working Experience AND Interview	-
					Manage and maintain workplace	105141L4		6				Manage and maintain workplace	111358L4		6			
					Monitor repair services	105150L4		6				Monitor repair services	105150L4		6			
34	REZZHE4A	Store Operation (Risk and Security Management)	The basic core competencies include: inspect the product loss prevention measures, provide well-maintained security environment at store, implement risk management of retail store and crisis management plan.	4	Provide well-maintained security environment at stores	105142L4	Six years experience in retail industry, of which not less than four years of relevant working experience	6	18	Verification of Documents and Working Experience AND Interview	-	Provide well-maintained security environment at stores	105142L4	Six years experience in retail industry, of which not less than four years of relevant working experience	6	18	Verification of Documents and Working Experience AND Interview	-
					Implement crisis management plan	105143L4		3				Implement crisis management plan	105143L4		3			
					Implement risk management of retail store	105147L4		6				Implement risk management of retail store	105147L4		6			
					Inspect the product loss prevention measures	105148L4		3				Inspect the product loss prevention measures	111361L4		3			
35	REZZHF4A	Store Operation (Personnel Management)	The basic core competencies include: manage retail team, deploy staff and manage the subordinate's work performance.	4	Deploy staff*	105133L3	Six years experience in retail industry, of which not less than four years of relevant working experience	3	12	Verification of Documents and Working Experience AND Interview	-	Deploy staff	111354L3	Six years experience in retail industry, of which not less than four years of relevant working experience	3	12	Verification of Documents and Working Experience AND Interview	-
					Manage the retail team*	105146L4		3				Manage the retail team	111360L4		3			
					Manage the subordinate's work performance*	105153L4		6				Manage the subordinate's work performance	111365L4		6			

Remarks: * Core competencies

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36	REZZHG4A	Store Operation (Franchise)	The basic core competencies include: manage franchise operations including termination of franchise.	4	Manage franchise operations	105144L4	Six years experience in retail industry, of which not less than four years of relevant working experience	6	12	Verification of Documents and Working Experience AND Interview	-	Manage franchise operations	105144L4	Six years experience in retail industry, of which not less than four years of relevant working experience	6	12	Verification of Documents and Working Experience AND Interview	-
					Manage the termination of franchise	105145L4		6				Manage the termination of franchise	111359L4		6			
37	REZZHH1A	Store Operation (General)	The basic core competencies include: comply with professional ethics and staff code of practice when performing routines, implement work safety guidelines, procedures for the sale of age restricted goods and hygiene. Preparations for commodity display, service customers, provide support and advice to customers.	1	Preparations for commodity display*	105038L1	One year experience in retail industry	3	24	Verification of Documents and Working Experience	Interview	Prepare for commodity display	111237L1	One year experience in retail industry	3	21	Verification of Documents and Working Experience	Interview
					Provide support and advice to customers*	105071L1		3				Provide support and advice to customers	111327L1		3			
					Serve customers*	105072L1		3				Serve customers	111328L1		3			
					Comply with professional ethics and staff code of practice*	105073L1		3				Comply with professional ethics and staff code of practice	105073L1		3			
					Implement hygiene procedures*	105116L1		3				Implement hygiene procedures	111344L1		3			
					Implement procedures for the sale of age restricted goods*	105117L1		3				Implement procedures for the sale of age restricted goods	105117L1		3			
					Implement work safety guidelines*	105129L2		6				Implement work safety guidelines	111350L2		3			
38	REZZHH2A	Store Operation (General)	The basic core competencies include: build up relationship with customers, use good communication skills to facilities transactions, process orders, deal with cash and credit card payment as well as perform retail sales system clearing. Replenish shelves and keep the retail environment clean and tidy.	2	Build up relationship with customers*	105074L2	Three years experience in retail industry, of which not less than two years of relevant working experience	3	24	Verification of Documents and Working Experience	Interview	Build up relationship with customers	111329L2	Three years experience in retail industry, of which not less than two years of relevant working experience	3	24	Verification of Documents and Working Experience	Interview
					Use good communication skills to facilitate transactions*	105075L2		3				Use good communication skills to facilitate transactions	111330L2		3			
					Perform retail sales system clearing*	105119L2		3				Perform retail sales system clearing	111345L2		3			
					Replenish shelves*	105120L2		3				Replenish shelves	111346L2		3			
					Process orders*	105127L2		3				Process orders	111348L2		3			
					Handle cash and credit card transaction payment*	105128L2		6				Handle cash and credit card transaction payment	111349L2		6			
					Keep the retail environment clean and tidy*	105130L2		3				Keep the retail environment clean and tidy	111351L2		3			
39	REZZHH3A	Store Operation (General)	The basic core competencies include: implement a sales plan, advertising, promotional activities, commodity display, quality customer service scheme, handle customers' complaints and implement store inventory control procedures and retail sales system.	3	Implement advertising and promotional activities*	105046L3	Five years experience in retail industry, of which not less than three years of relevant working experience	6	36	Verification of Documents and Working Experience	Interview	Implement advertising and promotional activities	111243L3	Five years experience in retail industry, of which not less than three years of relevant working experience	6	36	Verification of Documents and Working Experience	Interview
					Implement a sales plan*	105047L3		6				Implement a sales plan	111244L3		6			
					Implement quality customer service scheme	105076L3		6				Implement quality customer service scheme	111331L3		6			
					Handle customers' complaints*	105079L3		3				Handle customers' complaints	111333L3		3			
					Perform the procedures for store inventory control*	105118L2		6				Perform the procedures for store inventory control	105118L2		6			

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40	REZZHH4A	Store Operation (General)	The basic core competencies include: lead a sales team, provide in-service training, deploy staff, manage the financial resources of the retail store, monitor sales performance of goods as well as manage store display and inventory.	4	Use the retail sales system*	105138L3	Six years experience in retail industry, of which not less than four years of relevant working experience	3	33	Verification of Documents and Working Experience AND Interview	-	Use the retail sales system	111356L3	Six years experience in retail industry, of which not less than four years of relevant working experience	3	33	Verification of Documents and Working Experience AND Interview	-
					Implement commodity display*	105140L3		6				Implement commodity display	111357L3		6			
					Lead a sales team*	105051L4		6				Build and lead a sales team	111250L4		6			
					Monitor sales performance of goods*	105054L4		3				Monitor sales performance of goods	105054L4		3			
					Manage the financial resources of the retail store*	105149L4		6				Manage the financial resources of the retail store	111362L4		6			
					Manage retail store inventory*	105151L4		6				Manage retail store inventory	111363L4		6			
					Deploy staff*	105133L3		3				Deploy staff	111354L3		3			
					Provide in-service training*	105006L3		3				Provide in-service training	111376L3		3			
					Mange store displays*	105152L4		6				Mange store displays	111364L4		6			

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