

## UoCs in Customer Relationship Management

### Functional Area: Customer Relationship Management (Customer Satisfaction Management)

1. Title	Undertake general administrative work for accounts services	
2. Code	ITCSCR201A	
3. Range	This UoC applies to all routine administrative procedures, steps and tasks related to product and service delivery to customers. This applies to account services for various service plans offered to different customer segments via product / service provision channels.	
4. Level	2	
5. Credit	3	
6. Competency	<p>6.1 Possess the knowledge in the subject area</p> <p>6.2 Undertake general administrative work for accounts services</p> <p>6.3 Exhibit professionalism</p>	<p><u>Performance Requirement</u></p> <ul style="list-style-type: none"> <li>● Understand the importance of fundamental services - including the general administrative work for customer accounts, to the overall success of the company's CRM programme</li> <li>● Understand the standard operation procedures and compliance requirements associated with different customer segmentation groups</li> <li>● Understand the close relationship between the accurate and proper storage of customer information and the effective delivery of supporting administrative services</li> <li>● Understand that even for fundamental administrative services, there can be significant differences in expectation and behaviour between different customer segmentations</li> <li>● Be aware of the wide range of methods and practices in providing general supporting services, and their suitability in different circumstances</li> </ul> <p>Be able to:</p> <ul style="list-style-type: none"> <li>● Update customer accounts with the most current information in a periodic manner</li> <li>● Perform periodic analysis of customer accounts of different segmentation groups</li> <li>● Compel to a high level of control around sensitive data and processes from account opening to closing</li> <li>● Undertake the accomplishment of customer account administration tasks in an efficient and timely manner</li> <li>● 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</li> <li>● Efficiently deal with customer inquiries, provide them with advices and recommendations with respect to different aspects of the company's products and services</li> <li>● Always treat those customer administrative work as an integral and essential part of the overall CRM programme</li> <li>● Always ensure that all staff members are involved in customer administration and contribute their greatest effort in performing the daily supporting services</li> <li>● Always treat the interests and requests of customers with the highest priority</li> </ul>
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ol style="list-style-type: none"> <li>i. maintain an effective and efficient general administrative services for customers in different segments</li> <li>ii. gain the appreciation of customers through administrative support as an element of CRM</li> </ol>	
Remark		