

**Functional Area: Customer Relationship Management
(CRM Philosophy & Strategic Formulation)**

1. Title	Identify critical success factors and how success is going to be measured	
2. Code	ITCSCR401A	
3. Range	This UoC applies to all considerations and actions in identifying those critical successful factors associated with customer relationship management. The successful identification of these factors will contribute to the proper adoption and implementation of CRM related actions and activities in subsequent steps.	
4. Level	4	
5. Credit	4	
6. Competency	<p style="text-align: center;"><u>Performance Requirement</u></p> <p>6.1 Possess the knowledge in the subject area</p> <ul style="list-style-type: none"> ● Fully understand that the ultimate success or failure of all kinds of activities are affected by a certain number of critical factors, and those related to CRM are of no exception ● Fully aware of the importance of correctly identifying the above critical successful factors for formulating the company's CRM strategies and activities ● Understand that the level of success / failure needed to be defined in concrete terms and preferably bundled with quantity measurements if they are to be measured with accuracy ● Grasp the key issue that the proposed standards or level of completion for the above critical successful factors must follow the established CRM philosophy and ethics of the company ● Understand that as those critical successful factors will serve as long-term guidelines / objectives in setting up the company's CRM related activities and policies, any mistakes overlooked / ignored will incur prolonged or propagated harmful effects ● Be aware of the wide range of methods / techniques in measuring and evaluating the success / failure of those CRM related critical factors <p>6.2 Identify critical success factors and how success is going to be measured</p> <p>Be able to:</p> <ul style="list-style-type: none"> ● Exercise good analytical skill to identify and capture those critical success factors relating to CRM in general or factors dedicated to a particular CRM activity ● Skilfully integrate / mingle the above identified critical success factors such that they can become part of the company's CRM philosophy or ethics established earlier ● Establish with good accuracy some quantitative or qualitative measurements for those critical successful factors such that performance grading becomes possible ● Skilfully and tactfully process those critical success factors such that the resulting levels of performance are in line with the company's established CRM policies and other factors such as budget, resources allocation, etc ● Exercise good communication skill / administrative technique such that all levels of staff members are knowledgeable of those successful factors and established performance guidelines 	

	<ul style="list-style-type: none"> ● Design measures and actions to ensure that all levels of staff members will strictly stick to those established CRM policies (established based on the above critical success factors) and contribute their best efforts to meet the established performance level set for them ● Establish an effective procedure to document the details and any subsequent amendment to those success factors and performance settings ● Report the findings and subsequent updates related to CRM success factors to management, for supporting their decision making or policy formulation ● Disseminate necessary portions of the above findings to staff members / outsourcers involved in the company's CRM activities <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ● Always ensure all related parties contribute their greatest effort honestly in the process of critical success factors identification and performance grading ● Always strike a proper balance of the interests between parties such as customers, staff members and the company as whole
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ol style="list-style-type: none"> i. successfully and correctly identify those critical success factors relating to the company's CRM policies and activities ii. successfully establish levels of performance guidelines for measuring the success / failure of activities based on those critical success factors identified earlier
Remark	