

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

1. Title	Formulate strategy execution plan with appropriate management oversight, regular check-back and strategy review processes	
2. Code	ITCSCR508A	
3. Range	This UoC applies to all considerations and arrangements in the formulation of strategy execution plan for the company. The essential considerations for this task step includes management oversight, check-back and strategic review on a routine basis, etc.	
4. Level	5	
5. Credit	5	
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 the fundamental fact that established CRM strategies / sub-strategies need a well-defined execution plan as guidelines if they are to be implemented successfully ● Fully aware of the necessity of considering a lot of essential factors in order to arrive at an optimal CRM strategy execution plan for the company ● Fully comprehend that the so-called essential factors include the consideration for sufficient and timely management oversight ● Clearly understand that the essential factors include the embedding of an effective check-back mechanism ● Fully understand that the essential factors include the embedding of a periodic strategic review mechanism ● Be aware of the significant benefits in maintaining a proper balance and mix of the above consideration factors <p>6.2 Formulate strategy execution plan with appropriate management oversight, regular check-back and strategy review processes</p> <p>Be able to:</p> <ul style="list-style-type: none"> ● Demonstrate a thorough understanding and knowledge of the CRM strategies / sub-strategies endorsed by management ● Supervise the development of the associated execution plan for the company CRM strategies / sub-strategies ● Effectively design built-in / embedded mechanism into the execution plan so that management can always monitor all operations and inject changes as appropriate ● Establish a comprehensive documentation system into the CRM strategy execution plan such that all events / tasks performed are fully recorded, stored and be available for check-back or enquiry purposes ● Establish a standard periodic mechanism within the CRM strategic execution plan to enforce review of the plan and associated strategies / sub-strategies on a re-current basis ● Establish efficient and effective communication channels with all levels of staff members / outsourcers to ensure their understanding, support and observance of the CRM strategy execution plan ● Demonstrate accurate and sensitive prediction on the impact of competitor actions upon own company's products and services <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ● Always ensure all related staff members / outsourcers contribute their greatest effort honestly in formulating the CRM strategy execution plan for the company ● Always strike a proper balance between customers and the company while formulating and executing the plan ● Always maintain an optimal balance between all related technological, political, social and legal issues 	
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ol style="list-style-type: none"> i. successfully formulate a CRM strategy execution plan incorporating all essential factors mentioned for the company ii. ensure the execution plan could be understood and will be strictly adhered to by all involved personnel iii. ensure the implementation of the established execution plan will bring long term benefits to the company 	
Remark		