

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

1. Title	Formulate staff training at all levels for the established corporate CRM strategies	
2. Code	ITCSCR509A	
3. Range	This UoC applies to all tasks and arrangement for the formulation and provision of training to staff members / related personnel involved in the implementation of the established corporate CRM strategies. The step would be conducted after endorsement of the CRM strategies and manpower input, to avoid delay of all subsequent tasks.	
4. Level	5	
5. Credit	3	
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 training is a mandatory method to equip staff members with the necessary knowledge and skills to handle any assignment, and implementation of the established corporate CRM strategies is of no exception ● Grasp the key issue that there are no shortcuts in acquiring knowledge and skills and staff training should be conducted as early as possible, say after confirmation of the corporate CRM strategies ● Fully comprehend the complicated situations that different staff members will react differently to the training provided, which can significantly affect the expected outcome ● Fully aware that CRM strategies training can spread a wide range from technical knowledge to general soft skills, and the setting of a suitable curriculum can be very challenging ● Master the situation that training needs to be provided on a continuous or periodic basis in order to introduce the most updated information to trainees (staff members) ● Be aware of the wide range of sources for training provision including vendors, external training bodies and internal training departments, etc ● Be aware that training can be offered in very different formats and modes and that designing an appropriate mix can enhance its effectiveness <p>6.2 Formulate staff training at all levels for the established corporate CRM strategies</p> <p>Be able to:</p> <ul style="list-style-type: none"> ● Establish in advance the CRM strategies training material / contents with appropriate coverage and depth for different levels of staff members ● Supervise the development of a training schedule for different staff members groups, and consider their working schedule, required level of knowledge, depth of involvement, etc ● Design the best mix of training for the established CRM strategies, such as classroom teaching, practical workshop, scenario based training, etc ● Effectively make use of computer systems and related software to conduct training on top of or even substitute traditional training methods ● Recruit / deploy suitable external and internal trainers to conduct the CRM strategies training programs, and determine the necessity of training activities for trainers 	

	<ul style="list-style-type: none"> ● Consistently stick to the principle that effective training goes hand in hand with well-designed assessments such as quiz, examination or practical workshop ● Supervise the development of mechanisms to accurately monitor the progress and performance of individual trainees ● Estimate with good accuracy to arrive at a compromise between the costs for training provision, and the benefits after equipping staff members with the required knowledge and skills <p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ● Always ensure all trainers and trainees contribute their greatest effort while formulating, conducting or receiving training relating to the corporate CRM strategies ● Always strike a proper balance of interest between staff members and the company, and even customers while performing tasks relating to staff training
7. Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ol style="list-style-type: none"> i. formulate and arrange the most appropriate corporate CRM strategies trainings for different levels of staff members ii. realise the original training objectives that staff members' knowledge and skills can be enhanced / upgraded afterwards iii. ensure that the training provided to staff members can bring long term improvement in customer relationship, retention and loyalty, etc
Remark	