

Functional Area: Customer Relationship Management (Execution & Implementation)

1. Title	Establish policies and guidelines for customer contact management including customer acquisition and retention programme	
2. Code	ITCSCR512A	
3. Range	This UoC applies to all considerations and operations relating to the establishment of policies and guidelines for customer contact management. This task covers a broad range of activities relating to customer contacts and the focus is upon those directly related to customer acquisition and retention.	
4. Level	5	
5. Credit	5	
6. Competency	<p>6.1 Possess the knowledge in the subject area</p> <p>6.2 Establish policies and guidelines for customer contact management including customer acquisition and retention programme</p>	<p><u>Performance Requirement</u></p> <ul style="list-style-type: none"> ● Recognise that customer contact is a fundamental but probably the most important activity in the execution and implementation of the company's CRM programmes ● Recognise that as customer contact will be carried out by large number of staff members at all levels, the establishment of well-defined guidelines and policies becomes mandatory ● Fully understand that successful customer contact can be measured in a multi-dimensional manner, and customer acquisition & customer retention are two key performance indicators ● Fully alert that as customers are usually grouped into different segments (e.g. corporate accounts and individual accounts), their significantly different modes and focuses in customer contacts need separate policies and instructions for guidance ● Grasp the importance in correctly disseminate the policies regarding customer contact to all related personnel to ensure consistent services are being provided to customers ● Be aware of the wide choices of means, methods, skills (mainly soft skills) that can be adopted for customer contact management, each with its own relative strength and resources requirement ● Be aware of the importance in the periodic review of those performance indicators for customer contact management, and take appropriate follow up actions when required <p>Be able to:</p> <ul style="list-style-type: none"> ● Establish an atmosphere / culture within the company so that all level of staff members from seniors to front-end will agree to the concept of providing the best customer services through successful customer contacts ● Lead and educate all involved staff members the outcome expectation for their daily routines in customer contacts, say the number of new customers acquired, or the customer retention rate achieved ● Supervise the implementation of necessary procedures to ensure that all staff members involved in customer contacts are equipped with the necessary knowledge and skills in dealing with customers, say through the provision of trainings

	<p>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ● Predict with accuracy the human and other resources needed to be allocated to achieve the expected outcomes and seek management’s support and endorsement ● Deploy the most suitable employees for contacting and servicing customers in the different segment groups of the company ● Establish an accurate and timely monitoring system (using software tools if applicable) to record details such as the monthly (or other periodic intervals) increases in new customers, mobility and changes of existing customers, etc ● Ensure the monitoring system can also reflect whether established customer contact management policies and guidelines are being observed by the employees ● Ensure that in case if part or all of the customer contact assignments are outsourced, the outsourcers will perform in the same manner and achieve the same expected outcomes as own employees ● Always ensure all related staff members / outsourcers contribute their greatest effort honestly while contacting and serving the customers ● Always maintain the proper balance of interests between customers and the company as a whole ● Always ensure all company guidelines and legal requirements (such as the Privacy Act) are being considered and observed in all customer contact activities
<p>7. Assessment Criteria</p>	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ol style="list-style-type: none"> i. successfully launch a set of feasible policies and guidelines for customer contact management ii. ensure all executing parties including own employees and outsourcers will work according to guidelines iii. ensure the performance indicators measured as customer acquisition and retention can be achieved
<p>Remark</p>	