Unit of Competency

Functional Area: Marketing

Title	Implement customer relationship campaigns
Code	105499L4
Range	This unit of competency is applicable to those who are responsible for implementing customer relationship campaigns. It involves the application of basic project management skills to implement customer relationship campaigns.
Level	4
Credit	3 (for reference only)
Competency	Performance Requirements 1. Possess knowledge in customer relationship management • Familiar with components of CRM campaign • Comprehend corporate CRM strategy • Comprehend details of CRM campaign • Apply basic project management skills 2(a). Plan for implementation • Identify objectives of campaign • Identify profiles of target customers • Breakdown campaign into implementation tasks • Define deliverables and timeline 2(b). Implement customer relationship campaign • Coordinate with other responsible personnel to carry out tasks • Ensure intended customer interaction experience are created • Complete deliverables on time • Keep expenses within budget • Ensure campaign follows corporate CRM strategy • Ensure campaign complies with regulatory requirements, e.g. Personal Data Privacy Ordinance • Report progress to superior at appropriate time intervals • Coordinate amongst units to collect data to evaluate promotional effectiveness 3. Implement effective customer relationship campaign targeting to objectives defined in CRM strategy • Carry out tasks involved in customer relationship campaign according to pre-defined work breakdown, timeline and budget • Execute tasks according to CRM strategy to achieve intended objectives.
Assessment Criteria	The integrated outcome requirements of this unit of competency are: • Able to determine guidelines and allocate responsibilities of customer relationship campaign • Able to coordinate with responsible units in completing assignments • Able to adhere to predefined guidelines to achieve objectives.
Remark	This unit of competency is also applicable to general insurers, life insurers and broker.