

Specification of Competency Standards of the Insurance Industry

**Unit of Competency**

**Functional Area: Marketing**

Title	Design and launch secret customer programme
Code	105544L5
Range	This unit of competency is applicable to those who are responsible for developing and launching secret customer programme. It involves collection of quantitative and qualitative feedbacks on customer experience and conditions and evaluation of operations in compliance with regulatory requirements through mystery shopping.
Level	5
Credit	3 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> <li>1. Possess knowledge in secret customer programme <ul style="list-style-type: none"> <li>• Understand concepts and applications of mystery shopping</li> <li>• Comprehend corporate guidelines and relevant regulatory requirements</li> <li>• Define programme objective and scope</li> </ul> </li> <li>2(a). Develop secret customer programme <ul style="list-style-type: none"> <li>• Define objectives in conducting secret customer programme</li> <li>• Determine assessment criteria, e.g. sales process, customer service, etc.</li> <li>• Establish metrics in quantifying relevant products/services</li> <li>• Determine evaluation methods e.g. audio recording, onsite visits, online interaction etc</li> <li>• Decide timeframe and frequency for the implementation of programme</li> <li>• Estimate relevant cost and resource requirement for programme</li> <li>• Engage with service providers if expertise does not rest with management department</li> <li>• Identify sample size of secret customer programme</li> </ul> </li> <li>2(b). Launch secret customer programme <ul style="list-style-type: none"> <li>• Coordinate with relevant units/external service providers to launch secret customer programme based on predefined guidelines</li> <li>• Assess prescribed aspects of customer experience</li> <li>• Develop and support enhancement/corrective actions in response to the evaluation feedbacks</li> <li>• Evaluate effectiveness of secret customer programme regularly.</li> </ul> </li> <li>3. Carry out secret customer programme to assist evaluation of product and service qualities <ul style="list-style-type: none"> <li>• Design secret customer programme with relevant assessment criteria to achieve prescribed objectives</li> <li>• Collaborate with management department or external service providers in conducting mystery shopping</li> <li>• Respond to evaluation outcomes with actionable measures.</li> </ul> </li> </ol>
Assessment Criteria	<p>The integrated outcome requirements of this unit of competency are:</p> <ul style="list-style-type: none"> <li>• Able to define objectives of carrying out secret customer programme</li> <li>• Able to identify the elements in developing secret customer programme, including criteria, methodologies, timeline and budget</li> <li>• Able to coordinate with relevant units in the design and implementation of programme</li> <li>• Able to provide feasible suggestions to resolve problems identified through the programme</li> <li>• Able to review and fine-tune secret customer programme regularly.</li> </ul>
Remark	This unit of competency is also applicable to general insurers, life insurers and broker.