

**Specification of Competency Standards**  
**for the Property Management Industry**  
**Unit of Competency**

Functional Area - Facility Management relating to a Property

Title	Plan as a whole the customer relations and activities management, and determine the house rules and budget of club house
Code	110524L5
Range	Club house customer relationship, activities and financial management, applicable to planning as a whole the customer relationship management, activities, rules of club house and financial budgeting
Level	5
Credit	3
Competency	<p>Performance Requirements</p> <p>1. Proficient in customer relationship and activities management</p> <ul style="list-style-type: none"> <li>• Proficient in concepts and models of customer relationship management, events or activities management and financial management</li> <li>• Proficient in the legal requirements of various activities</li> <li>• Proficient in rules of club house, the requirements of deed of mutual covenant of the building and relevant legislations</li> </ul> <p>2. Plan as a whole the customer relationship management</p> <ul style="list-style-type: none"> <li>• Plan as a whole the various ways to understand customer needs and devise appropriate customer services, such as conducting customer opinion surveys or formation of focus groups to collect customer opinions</li> <li>• Be able to develop a customer relationship management model, including contact, communication and follow-up, then promote and build customer relationships</li> <li>• Be able to review regularly the customer relationships model and adopt the latest and effective media or methods to improve the effectiveness of customer relationships management</li> </ul> <p>3. Plan as a whole the activities management</p> <ul style="list-style-type: none"> <li>• Be able to analyse needs of customers, plan as a whole the regular and irregular activities or events held by the club house to build relationships with owners and customers</li> <li>• Be able to analyse the collection of data, review the effectiveness of the activities and make amendments</li> <li>• Be able to plan the overall management of contingency plans for activities or events</li> </ul> <p>4. Formulate rules of club house and financial management</p> <ul style="list-style-type: none"> <li>• Be proficient in the deed of mutual covenant and legal requirements of the building, devise the rules of the club house and formulate the mode of implementation</li> <li>• Be able to plan the financial budget of the club house and supervise the income and expenditure of the club house</li> <li>• Be able to plan the use of clubhouse resources and expand the sources of revenue</li> </ul>
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> <li>• Be proficient in concepts and models of customer relationship management, events and activities management and financial management, and devise plans as a whole;</li> <li>• Be able to devise, promote and regularly review the effectiveness of customer relationship management models and activities to enhance the effectiveness of customer relationship management;</li> </ul>

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	<ul style="list-style-type: none"><li>• Be able to analyse the needs of customers, plan as a whole and promote club house events or activities to strengthen relationships with owners and customers; and</li><li>• Be able to formulate the rules of club house, plan the financial budget, regulate and control the revenues and expenditures of the club house.</li></ul>
Remark	