

Specification of Competency Standards of the Retail Industry

Unit of Competency

Functional Area: Customer Services

Title	Compile customer relationship management (CRM) system data
Code	105077L3
Range	This unit of competency (UoC) is applicable to customer service staff in the retail industry. It covers the abilities to make careful analysis and judgement; and use different CRM systems to compile data or reports to help the organization develop its retail business.
Level	3
Credit	3 (for reference only)
Competency	<p>Performance Requirements</p> <p>1. Knowledge of CRM system</p> <ul style="list-style-type: none"> • Understand the basic objectives of customer relationship management of the organization, e.g. provide better customer service • Understand the functions, content and operating procedures of the CRM systems of the organization, including: <ul style="list-style-type: none"> • Category, level and time limit of information stored • Method, procedures and authority of accessing information • Method of compiling data or reports • Understand the requirements of different departments/units on customer data, including: <ul style="list-style-type: none"> • Level of detail of information • Timeliness of information • Sensitivity of information • Understand relevant legal requirements, e.g. Personal Data (Privacy) Ordinance • Master the techniques of operating E- CRM system <p>2. Compile customer relationship management system data</p> <ul style="list-style-type: none"> • Search and access data from different CRM systems according to the requirements of different departments/units • Ensure that the presentation and format of the data or reports meet the requirements of different departments/units • Use data and reports provided by the CRM systems to help design the relevant CRM activities • Ensure that only the authorized departments/units can access relevant data or reports • Adjust or change the method and procedures of compiling data of CRM systems to cope with the computer hardware and software upgrade <p>3. Exhibit professionalism</p> <ul style="list-style-type: none"> • Do not use the CRM systems to act against the benefit of the organization and customers in any case • Strictly follow relevant legal requirements when processing and compiling data
Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> • Use the CRM systems of the organization effectively to compile necessary data and reports for relevant departments/units.
Remark	