

**Specification of Competency Standards**  
**for the Retail Industry**  
**Unit of Competency**

Functional Area - Customer Services

Title	Prepare data report of customer relationship management system
Code	107130L4
Description	Use different customer relationship management system to edit data or prepare report so as to support corporate to develop retail business.
Level	4
Credit	6 ( For Reference Only )
Competency	<p>Performance Requirements</p> <p>1. Master the relevant knowledge of customer relationship management system</p> <ul style="list-style-type: none"> <li>• Review the objectives of the corporate customer relationship management such as providing better customer service and prepare make the right data report</li> <li>• Apply the functions, contents and operating procedures of the corporate customer relationship management system to identify the appropriate data include: <ul style="list-style-type: none"> <li>○ The type, level and time limit for data storage</li> <li>○ Methods, procedures and authority to extract data</li> <li>○ The preparation of data or reporting methods</li> </ul> </li> <li>• Understand the requirements of customer data from different departments / work units, including: <ul style="list-style-type: none"> <li>○ The level of information details</li> <li>○ The timeliness of the information</li> <li>○ Data sensitivity</li> </ul> </li> <li>• Understand the relevant legislation such as the Personal Data (Privacy) Ordinance</li> <li>• Master the skills to operate electronic customer relationship management system</li> </ul> <p>2. Prepare data report of customer relationship management system</p> <ul style="list-style-type: none"> <li>• Search and read the required data from different customer relationship management systems according to the requirements of different departments / work units</li> <li>• Ensure that the data or report format to meet the needs of different departments / units</li> <li>• Use the data and reports provided by the customer relationship management system to assist in the design of relevant customer relationship management activities</li> <li>• Establish the authorisation of each department to ensure that departments or units can only access data or reports related to their business</li> <li>• With consideration of the hardware technology advancement, enhance, adjust or change the customer relationship management system to prepare data and procedures</li> </ul> <p>3. Exhibit professionalism</p> <ul style="list-style-type: none"> <li>• Protect the interests of corporate and customers when using the system data</li> <li>• Strictly comply with the relevant legislative requirements when processing and compiling data</li> </ul>
Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> <li>• Effectively apply corporate customer relationship management systems to prepare the required data and reports for the relevant departments / units</li> </ul>
Remark	