

Specification of Competency Standards
for the Retail Industry
Unit of Competency

Functional Area - Customer Services

Title	Develop Customer Relationship Management (CRM) strategy
Code	107136L6
Description	According to the business objectives of corporate, develop effective customer relationship management strategy to maintain existing customers, attract new customers and explore potential customers so as to develop the retail e-business.
Level	6
Credit	6 (For Reference Only)
Competency	<p>Performance Requirements</p> <p>1. Knowledge of Customer Relationship Management (CRM) strategy</p> <ul style="list-style-type: none"> • Understand the theory of CRM including: <ul style="list-style-type: none"> ○ Orientation of retail e-business ○ Benefits of good customer relationship ○ Purpose of the development of customer relations <ul style="list-style-type: none"> ▪ Keep existing customers ▪ Source new customers ▪ Maximize customer value ○ Understand the generality and uniqueness of retail e-business customers ○ Understand the customer relationship of the retail e-business, including: <ul style="list-style-type: none"> ▪ Strategies for online and offline transaction management ▪ Relationship management strategies such as: <ul style="list-style-type: none"> ▪ Partnerships ▪ Consultants and the difficulty to resolve relationships ▪ Associates (company customers) ▪ Functional relationship ▪ The strategic role of commodity suppliers in customer promotion ○ Understand the strategy of managing customer database system ○ Understand the relationship between enterprise data strategy and customer database system <p>2. Develop CRM strategy</p> <ul style="list-style-type: none"> • According to the overall goal of the corporate, develop effective customer relationship management strategy <ul style="list-style-type: none"> ○ Develop the organizational structure of customer relationship management ○ Develop methods, steps, and workflows to maintain customer relationship management, such as: <ul style="list-style-type: none"> ▪ Customer screening criteria ▪ Loyalty customer program ▪ Focus group discussion ▪ Approach to discover new customers ▪ Guidelines for classifying customers ▪ Evaluation and remedy of Customer Loss ▪ Handling of customer complaints and follow up procedures ○ Leverage customer relationships to build and maintain long-term customer relationships and maintain customer loyalty to business services / products ○ Develop innovative strategies for customer relationships, such as: <ul style="list-style-type: none"> ▪ Explore the relationship with the customer ▪ Development of retail e-business marketing

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	<ul style="list-style-type: none"> ▪ Commitment and feedback of customer relationship ○ Explore and strengthen the customer relationship approach ○ Apply database technology to facilitate the implementation of customer relationship strategy, such as: <ul style="list-style-type: none"> ▪ Develop computer system procedures ▪ Analysis of customer relationship and business opportunity ▪ Build e-business contact network ▪ Promotion of online market ▪ Develop and update related computer hardware and software • Regularly review the customer relationship management strategy to assess the impact of customer relationship operations on the impact of corporate <p>3. Exhibit professionalism</p> <ul style="list-style-type: none"> • Take into consideration of protecting the interests of corporate and customers during the development of the CRM strategy • Comply the Personal Data (Privacy) Ordinance in considering and developing the CRM strategy
Assessment Criteria	<p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> • Master the expertise of customer relationship management • Take into considerations of the objectives of the corporate to develop effective customer relationship management strategies, to review and integration of relevant information and data, to make an analysis and assessment so as to establish long-term benefits for the corporate.
Remark	