

Specification of Competency Standards
for the Retail Industry
Unit of Competency

Functional Area - Customer Relationship Management

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|---------------------|---|
| Title | Manage online customer information |
| Code | 107186L4 |
| Description | Record the online sales activities of customers and implement effective and standardized information management. |
| Level | 4 |
| Credit | 6 (For Reference Only) |
| Competency | <p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Understand the difference between traditional and online customer information management <ul style="list-style-type: none"> • More information to be managed • Better real-time management – reduce the communication time between corporate and customers • Wider scope of content management • Pay more attention on information security 2. Implement the workflow of customer information collection <ul style="list-style-type: none"> • Understand the corporate standard procedures of tracking information • Comply with the corporate internal requirements of collecting customer information • Understand the importance of personal data privacy issue 3. Update and manage customer profile <ul style="list-style-type: none"> • Establish a system to keep and analyze customer online sales information and preference • Set the authorization right to assess customer information • Regularly review substandard and missing customer information. Supplement the shortcoming information through appropriate channels. • Prepare reports to provide results of sales activity monitoring. 4. Exhibit professionalism <ul style="list-style-type: none"> • Deal with customer information in a rigorous manner to avoid breaking the Personal Data (Privacy) Ordinance • Keep a balance of interests between corporate and customers. |
| Assessment Criteria | <p>The integrated outcome requirement of this UoC is the ability to:</p> <ul style="list-style-type: none"> • Master the method of customer information management • Master the method to update and revise customer profile |
| Remark | |