Specification of Competency Standards
for the Retail Industry
Unit of Competency

Functional Area - Customer Relationship Management

Title	Explore potential requirements of online customers
Code	107188L5
Description	In the e-business sales process, more attractive measures to existing customers to explore their new needs or potential customers.
Level	5
Credit	6 （For Reference Only）

Competency	**Performance Requirements**
	1. Understand what is potential customer and the principle to explore potential customer
	
	• Understand the definition of potential customer and the value they could bring to the corporate
	• Understand the principles that need to follow to explore potential customers
	    o Tailor-made principles: choose to meet the specific needs of potential customers
	    o Focus on the 80/20 principle. Focus on customers with high potential as first priority
	
	2. Recognize and apply different methods to explore potential customers
	
	• Customer referral method
	    o Referral method from existing customers. Processing time could be shortened through the online platform.
	• Influence method
	    o Source and engage key persons as customer and then make use of the influencing power of the key persons to accelerate the development of potential customers.
	• Email promotion
	    o Advantages include lower cost, more contact and wide range of coverage. Shortcoming include longer cycle time.
	• Social media promotion services
	    o Use online video platform to do online marketing.
	• Target advertisement with web search engine
	    o Cost reduction method by making use of keywords to target the potential customers.
	• Market consultation method
	    o Use a variety of specialized market information tools or information provided by the relevant government departments to explore potential customers
	
	3. Exhibit professionalism
	
	• Explore potential customers in a rigorous manner to avoid breaking the Personal Data (Privacy) Ordinance

Assessment Criteria	The integrated outcome requirement of this UoC is the ability to: • Understand the importance of exploring potential customers. • Master the technique and methods to explore potential customers.
Remark	