

Specification of Competency Standards
for the Retail Industry
Unit of Competency

Functional Area - Customer Relationship Management

Title	Apply technology to support customer relationship management
Code	107189L5
Description	As a role of online customer relationship management staff, they need to understand how to apply technology to support customer relationship management.
Level	5
Credit	6 (For Reference Only)
Competency	<p>Performance Requirements</p> <p>1. Understand the relevant knowledge of Customer Relationship Management (CRM)</p> <ul style="list-style-type: none"> • Understand reasons of CRM development <ul style="list-style-type: none"> ○ Pull by demand ○ Push from technology ○ Updated management concept • Understand the concept and characteristics of CRM <ul style="list-style-type: none"> ○ Comprehensive <ul style="list-style-type: none"> ▪ CRM system not only enables corporate to have a flexible and effective customer exchange platform but also enable corporate to integrate the basic capacity to deal with customer business so as to achieve the new customer management model in e-business operation. ○ Integrative <ul style="list-style-type: none"> ▪ Integration of CRM system with other corporate system applications (ERP-enterprise resource planning, SCM-supply chain management) integration capabilities. For corporate, true creation of customer value could only be achieved through the full integration of the application systems. ○ Intelligent <ul style="list-style-type: none"> ▪ Substantial enhancement of corporate marketing management and user experience by setting a customer relation management system integrating different platforms including one-stop service, internet thinking and big data analysis. <p>2. Apply the major operation modules of CRM</p> <ul style="list-style-type: none"> • Review the functions of major CRM modules <ul style="list-style-type: none"> ○ Sales module: assist the corporate to management sales business with major functions including quota management, sales capacity management and regional management. ○ Marketing module: plan, implement, monitor and analyze marketing activities directly. ○ Customer relationship module: Enhance the automation and optimization of the workflow processes relevant to customer supports, on-site services and warehouse management. ○ Customer interaction module: make use of different online communication channels with customers to promote sales and services. <p>3. Exhibit professionalism</p> <ul style="list-style-type: none"> • Keep a balance of interests between corporate and customers during the development of customer relationship strategy.

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Assessment Criteria	The integrated outcome requirement of this UoC is the ability to: <ul style="list-style-type: none">• Master the concept and characteristics of CRM system.• Master and apply the major modules in a CRM system.
Remark	