

Specification of Competency Standards
for the Retail Industry
Unit of Competency

Functional Area - Customer Relationship Management

Title	Analyze, plan and optimize CRM system
Code	107191L5
Description	Manage Customer Relationship Management (CRM) software to assist corporate to develop and apply effective CRM system.
Level	5
Credit	12 (For Reference Only)
Competency	<p>Performance Requirements</p> <p>1. Analyze the factors for successful CRM</p> <ul style="list-style-type: none"> • Clearly explain to the management of the time, finance and other recourses requirements of CRM development • Focus on workflow process but not over focus on technology • Flexible application of technology. Select the suitable technology based on the problems of workflow but not to adjust workflow to fit for technology requirements. • Review the implementation capability of the CRM team, including: <ul style="list-style-type: none"> ○ The capability to adjust business workflow ○ The capability to implement system specialization and integration ○ The requests to IT department including network design and data synchronization etc. ○ The capacity to change management. • Review human factors <ul style="list-style-type: none"> ○ In every stage of CRM project, seek supports from different stakeholders such that stakeholders would take up their own responsibility. • Develop step-by-step implementation process <ul style="list-style-type: none"> ○ Through workflow analysis to identify the critical components of the workflow for prior CRM implementation. <p>2. Apply CRM software system</p> <ul style="list-style-type: none"> • From the large amount of data generated in the business process and management process of the corporate, select and apply the business intelligence tools within the CRM system for analysis to support the judgment in business management and development. Tools include: <ul style="list-style-type: none"> ○ Analysis processing tool <ul style="list-style-type: none"> ▪ Conduct analysis and processing of the data stored. General options include pre-calculation and real-time calculation. ○ Report query tool <ul style="list-style-type: none"> ▪ Fast, simple, easy-to-use query and reporting tools help management to take full advantage of the different levels of data in the corporate to collect information they need and to display the information in a reasonable format. ○ Data mining tool <ul style="list-style-type: none"> ▪ Automatically search for any hidden relationship among a large amount of data. Through statistical and analytical processes to explore hidden new information of customers. ▪ Focus on understanding the business characteristics and transform it into the conditions and parameters for data analysis. ▪ Convert, clean and import data that can be extracted from multiple data sources and combine to form a valid database.

Specification of Competency Standards
for the Retail Industry
Unit of Competency

Functional Area - Customer Relationship Management

	<ul style="list-style-type: none"> ▪ Analyze data and build models: regularize existing data and use existing models to process data analysis. ▪ Evaluation and application: excellent assessment method is to use different time periods so that the system could forecast the consumption behavior and then compare the forecast results and the actual situation. <p>3. Exhibit professionalism</p> <ul style="list-style-type: none"> • Deal with customer information in a rigorous manner to avoid breaking the Personal Data (Privacy) Ordinance. • Keep appropriate balance of interest 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 professional knowledge of customer relationship management. • Develop effective customer relationship management strategy to review and integrate relevant information and data for analysis and set the long-term development direction for the corporate.
Remark	