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	111278L5
Range	This unit of competency (UoC) is applicable to the staff responsible for customer relationship management. Practitioners have the ability to understand how to apply technology to support customer relationship management.
Level	5
Credit	6 （For Reference Only）

Competency	Performance Requirements
	1. Analyse the relevant knowledge of Customer Relationship Management (CRM)
	
	• Understand reasons of CRM development
	  o Pull by demand
	  o Push from technology
	  o Updated management concept
	• Analyse the concept and characteristics of CRM
	  o Comprehensive
	    ▪ 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
	  o Integrative
	    ▪ 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
	  o Intelligent
	    ▪ 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
	
	2. Apply technology to support CRM
	
	• Review the functions of major CRM modules
	  o Sales module: assist the corporate to management sales business with major functions including quota management, sales capacity management and regional management.
	  o Marketing module: plan, implement, monitor and analyse marketing activities directly.
	  o Customer relationship module: Enhance the automation and optimisation of the workflow processes relevant to customer supports, on-site services and warehouse management.
	  o Customer interaction module: make use of different online communication channels with customers to promote sales and services
	• Assess the impact of CRM system on corporate retailing, such as increase of sales, additional costs, etc.
	
	3. Exhibit professionalism

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	• Keep a balance of interests between corporate and customers during the development of customer relationship strategy
Assessment Criteria	The integrated outcome requirements of this UoC are the abilities to: • Master the concept and characteristics of CRM system; and • Master and apply the major modules in a CRM system.
Remark	This UoC is adopted from 107189L5