

**Specification of Competency Standards**  
**for the Retail Industry**  
**Unit of Competency**

Functional Area - Customer Relationship Management

Title	Analyse, plan and optimise Customer Relationship Management system
Code	111279L5
Range	This unit of competency (UoC) is applicable to the staff responsible for customer relationship management. Practitioners have the ability to manage Customer Relationship Management (CRM) software to assist corporate to develop and apply effective CRM system.
Level	5
Credit	6 (For Reference Only)
Competency	<p>Performance Requirements</p> <p>1. Analyse the factors for successful CRM</p> <ul style="list-style-type: none"> <li>• Clearly explain to the management of the time, finance and other recourses requirements of CRM development</li> <li>• Focus on workflow process but not over focus on technology</li> <li>• Flexible application of technology. Select the suitable technology based on the problems of workflow but not to adjust workflow to fit for technology requirements</li> <li>• Analyse the implementation capability of the CRM team, including: <ul style="list-style-type: none"> <li>○ The capability to adjust business workflow</li> <li>○ The capability to implement system specialisation and integration</li> <li>○ The requests to IT department including network design and data synchronisation etc.</li> <li>○ The capacity to change management.</li> </ul> </li> <li>• Review human factors <ul style="list-style-type: none"> <li>○ In every stage of CRM project, seek supports from different stakeholders such that stakeholders would take up their own responsibility</li> </ul> </li> <li>• Develop step-by-step implementation process <ul style="list-style-type: none"> <li>○ Through workflow analysis to identify the critical components of the workflow for prior CRM implementation</li> </ul> </li> </ul> <p>2. Analyse, plan and optimise CRM system</p> <ul style="list-style-type: none"> <li>• From the large amount of data generated in the business process and management process of the organisation, 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"> <li>○ Analysis processing tool <ul style="list-style-type: none"> <li>▪ Conduct analysis and processing of the data stored. General options include pre-calculation and real-time calculation</li> </ul> </li> <li>○ Report query tool <ul style="list-style-type: none"> <li>▪ 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</li> </ul> </li> <li>○ Data mining tool <ul style="list-style-type: none"> <li>▪ Automatically search for any hidden relationship among a large amount of data. Through statistical and analytical processes to explore hidden new information of customers</li> <li>▪ Focus on understanding the business characteristics and transform it into the conditions and parameters for data analysis</li> <li>▪ Convert, clean and import data that can be extracted from multiple data sources and combine to form a valid database</li> </ul> </li> </ul> </li> </ul>

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	<ul style="list-style-type: none"> <li>▪ Analyse data and build models: organise existing data and use existing models to process data analysis</li> <li>▪ 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</li> </ul> <p>3. Exhibit professionalism</p> <ul style="list-style-type: none"> <li>• Follow the Personal Data (Privacy) Ordinance when dealing with customer information</li> <li>• Keep appropriate balance of interest between corporate and customers</li> </ul>
Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> <li>• Master the professional knowledge of CRM; and</li> <li>• Develop effective CRM strategy to review and integrate relevant information and data for analysis and set the long-term development direction for the corporate.</li> </ul>
Remark	<p>This UoC is adopted from 107191L5. The UoC title is revised. The QF credit is adjusted from 12 to 6.</p>