

Specification of Competency Standards
for the Retail Industry
Unit of Competency

Functional Area - Information Technology

Title	Handle customer profile and activity record
Code	111402L3
Range	This unit of competency (UoC) is applicable to staff responsible for sales in the retail industry. Practitioners have the ability to handle and record customers' sales records in daily activities and procedures, and correspondingly the related profit and loss calculation and data recording.
Level	3
Credit	4 (For Reference Only)
Competency	<p>Performance Requirements</p> <p>1. Possess the knowledge in the subject area</p> <ul style="list-style-type: none"> • Understand the importance of the timely and accurate recording of sales data in every step of the sales cycle • Understand the necessity in collecting all relevant information such as information related to customers, products, transactions, etc • Understand the need of a unique level of integrated and accurate treatment while managing customer profit and sales records across all customer segmentations • Understand the standard procedures of tracking systems so that the system can be operated independently • Understand that the handling of customer profit and sales records must comply with the requirements of the company's internal tracking mechanism • Be aware of the close relationship between the company's CRM strategies and customer records handling activities <p>2. Handle customer profile and activity record</p> <ul style="list-style-type: none"> • Maintain and update the data to ensure its accuracy and integrity, utilising computer systems and application packages whenever applicable • Detect the irregularities or missing data and seek information from appropriate sources to supplement the insufficiency • Generate reports to provide visibility on sales activities and monitor sales results • Provide relevant statistics and conduct analysis related to sales cycle management upon request • Document the records and information regarding customer sales and profit accurately, probably with the use of computerised database management software <p>3. Exhibit professionalism</p> <ul style="list-style-type: none"> • Always ensure all related staff members contribute their greatest effort honestly while handling customer sales and profit records • Always maintain the proper balance of interests between customers and the company as a whole • Always process customer data with a scientific and objective approach
Assessment Criteria	<p>The integrated outcome requirements of this UoC are the abilities to:</p> <ul style="list-style-type: none"> • Successfully provide accurate and timely reports on sales data • Fulfil the information requirements as requested by different stakeholders • Permanently record the relevant information and make available for future queries or updates upon request
Remark	This UoC is adopted from 100223L3. The UoC title is revised.