

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

Functional Area - Common Competency

Title	Formulate customer relation management strategy
Code	108799L6
Range	This unit of competency is applicable in workplaces relevant to the customer relation management of vehicle sales and after-sales services. Practitioners should be able to formulate effective customer relation management strategy in accordance with organisational mission and objectives to maintain existing customers, attract new customers, source potential customers to enhance business.
Level	6
Credit	9 (For Reference Only)
Competency	<p>Performance Requirements</p> <p>1. Knowledge (Customer relation management)</p> <ul style="list-style-type: none"> <li>• Master the significance of customer relation management to the reputation, achievements and profits of the entire organisation.</li> <li>• Master customer relation management: <ul style="list-style-type: none"> <li>○ Market orientation and customer orientation</li> <li>○ Interests of customer relation</li> <li>○ Purposes of customer relation</li> <li>○ Characteristics of customer relation</li> </ul> </li> <li>• Master customer relation management strategy, including: <ul style="list-style-type: none"> <li>○ Transaction management</li> <li>○ Relation management</li> <li>○ Suppliers and customers promotion</li> </ul> </li> <li>• Good understanding of data base system for customer information.</li> </ul> <p>2. Performance (Formulate customer relation management strategy)</p> <ul style="list-style-type: none"> <li>• Through mastering the theory of customer relation management and the knowledge of the characteristics of customers in the vehicle market, coach subordinate staff to formulate customer relation management strategy suitable for the organisation: <ul style="list-style-type: none"> <li>○ Establish the structure of customer relation management system</li> <li>○ Establish the methods, procedure and workflow for maintaining customer relation management, such as: <ul style="list-style-type: none"> <li>▪ selection criteria of customers</li> <li>▪ methods to source new customers</li> <li>▪ classification of customers</li> <li>▪ assess customer loss and take remedial measures</li> <li>▪ procedures for handling and following up on customer's complaints</li> <li>▪ take the edge of customer relation to create and maintain customer relation</li> <li>▪ explore and strengthen customer relation</li> <li>▪ apply data base techniques to implement customer relation strategy</li> <li>▪ departmental coordination and cooperation</li> <li>▪ resources requirement and budget estimates</li> <li>▪ reporting format, content and mechanism</li> </ul> </li> </ul> </li> <li>• Demand regular submission of reports and data to assess the effectiveness of the customer relation operation and its impact on the entire organisation.</li> </ul>
Assessment Criteria	The integrated outcome requirements of this unit of competency are that the practitioner being assessed shall prove that he/she is:

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	<ul style="list-style-type: none"><li>• Capable of mastering the professional knowledge and techniques of customer relation management; and</li><li>• Capable of leading subordinate staff to formulate effective customer relation management strategy in accordance with the overall objectives of the organisation to enhance the image of the organisation and foster business; and protect and safeguard the reputation, achievements and profits of the organisation to facilitate long-term development.</li></ul>
Remark	