

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

Functional Area - Technology Support

Title	Apply basic knowledge of customer relationship management
Code	108967L2
Range	This unit of competency is applicable to practitioners responsible for customer relationship management in the jewellery industry. In the daily working environment, practitioners should have basic knowledge of the management of relationships with customers, so as to understand the purchasing needs of customers under instruction. They should also be able to provide suitable information to assist customers in selecting the right products and introduce new products/services of the organization to the customers. The above arrangements should be systematized to meet the marketing purposes of the organization.
Level	2
Credit	3
Competency	<p>Performance Requirements</p> <p>1. Understand the basic knowledge of customer relationship management</p> <ul style="list-style-type: none"> <li>• Know about the benefits of customer relationship management <ul style="list-style-type: none"> <li>○ Store and manage customer/member details in an organized manner</li> <li>○ Strengthen the communication with customers and respond to customers' requests promptly</li> <li>○ Effectively study the purchase cycles and preferences of customers to organize targeted campaigns</li> <li>○ Management can use market analysis to determine the marketing strategies to meet market demands</li> <li>○ Significantly improve customer service levels and satisfaction</li> <li>○ Understand the basic knowledge of customer relationship management</li> <li>○ Key functions of customer relationship management, including: <ul style="list-style-type: none"> <li>▪ Customer management</li> <li>▪ Member management</li> <li>▪ Customer relationship management mails</li> <li>▪ Email templates</li> <li>▪ Email records</li> <li>▪ Customer enquiries</li> <li>▪ Customer follow-up action lists</li> <li>▪ Sales records</li> <li>▪ Contact records</li> <li>▪ Customer category management</li> <li>▪ Bonus point calculation</li> <li>▪ Gift records</li> <li>▪ Maintenance records</li> <li>▪ Preferences analysis</li> </ul> </li> <li>○ Figure out the relationship between customer data and customer behaviours</li> <li>○ Conduct statistical cross analysis</li> <li>○ Understand the relevant legal requirements for the storage of customer data, such as the Personal Data (Privacy) Ordinance</li> </ul> </li> <li>• Know about various customer relationship management software</li> <li>• Know about the technology management systems that support customer relationship management, such as: <ul style="list-style-type: none"> <li>○ Data storage</li> <li>○ Data collection</li> <li>○ Sales automation</li> </ul> </li> </ul>

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	<ul style="list-style-type: none"> <li>○ Computer telephony integration system</li> <li>○ The Internet</li> </ul> <p>2. Apply the customer relationship management system</p> <ul style="list-style-type: none"> <li>• Understand the basic knowledge of the management of relationships with customers, and, under instruction, use the relevant customer relationship management software adopted by the organization to manage customer relationships in accordance with the established procedures and code of practice of the organization.</li> </ul> <p>3. Professionalism</p> <ul style="list-style-type: none"> <li>• Communicate with customers in a professional manner to prevent any deceptive conduct</li> <li>• Keep up with the latest legislation on information, privacy and information security to ensure the provided information does not violate the relevant privacy ordinances</li> <li>• Provide customers with useful information about privacy rights and information security so as to help them prevent their identity from being stolen by the others</li> </ul>
Assessment Criteria	<p>The integrated outcome requirements of this unit of competency are:</p> <ul style="list-style-type: none"> <li>• Able to use the customer relationship management system to build relationships with customers, understand their needs and help them choose the right products; and</li> <li>• Collect customer information in accordance with the policies and procedures of the organization.</li> </ul>
Remark	