

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

Functional Area - Technology Support □

Title	Use the customer relationship management system
Code	108970L3
Range	This unit of competency is applicable to practitioners responsible for customer relationship management in the jewellery industry. Practitioners should have basic understanding of customer relationship management and be capable of mastering the techniques of using the relevant system to have effective interaction with customers independently in accordance with the established procedures and code of practice of the organization, so as to enhance communication and respond to customer requests promptly, with the aim of improving the customer service level and customer satisfaction to achieve the marketing purposes of the company.
Level	3
Credit	3
Competency	<p>Performance Requirements</p> <p>1. Know about the customer relationship management system</p> <ul style="list-style-type: none"> <li>• Know about the categories of functions of the customer relationship management system, including: <ul style="list-style-type: none"> <li>○ Operational <ul style="list-style-type: none"> <li>▪ Marketing automation</li> <li>▪ Sales automation</li> <li>▪ Customer service automation</li> </ul> </li> <li>○ Analytical <ul style="list-style-type: none"> <li>▪ Data exploration</li> <li>▪ Online analysis tool</li> <li>▪ Reporting system</li> </ul> </li> <li>○ Collaborative <ul style="list-style-type: none"> <li>▪ E-mail management</li> <li>▪ Online customer service</li> <li>▪ Telephone customer service</li> </ul> </li> </ul> </li> <li>• Understand the areas of application of the customer relationship management system, including: <ul style="list-style-type: none"> <li>○ Marketing</li> <li>○ Sales</li> <li>○ Service</li> </ul> </li> <li>• Know about the ordinances related to information security and privacy</li> </ul> <p>2. Use the customer relationship management system</p> <ul style="list-style-type: none"> <li>• Master the use of the customer relationship management system and manage customer relationships independently using the relevant system in accordance with the established procedures and code of practice of the organization, including: <ul style="list-style-type: none"> <li>○ Establish relationships with new customers and maintain relationships with existing customers</li> <li>○ Communicate with various departments such as sales, marketing, promotion, planning and human resources</li> <li>○ Optimize all business segments to reduce customer loss and company costs in every segment</li> <li>○ Collect customer information for cross-selling</li> <li>○ Analyze marketing data and provide customer distribution data</li> <li>○ Improve control capabilities, such as:</li> </ul> </li> </ul>

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	<ul style="list-style-type: none"> <li>▪ Real-time update of order status, and reminder for payment and abnormal invoice tracking</li> <li>▪ Product review tracking to improve optimization capability</li> </ul> <ul style="list-style-type: none"> <li>• Know about the security measures of the customer relationship management system, including: <ul style="list-style-type: none"> <li>○ Access rights setting</li> <li>○ Automatic data backup</li> <li>○ Security control for access by remote branches</li> </ul> </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 legislation on 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 requirement of this unit of competency is:</p> <ul style="list-style-type: none"> <li>• Able to master the use of the customer relationship management system to have effective interaction with customers independently, so as to enhance communication and respond to customer requests promptly, with the aim of improving the customer service level and customer satisfaction to achieve the marketing purposes of the company.</li> </ul>
Remark	