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| 1. Title | Manage customer profile and activity record |
| 2. Code | 100223L3 |
| 3. Range | This UoC applies to all daily activities and procedures to manage and record customers' sales records, and correspondingly the related profit and loss calculation and data recording. |
| 4. Level | 3 |
| 5. Credit | 4 (for reference only) |
| 6. Competency | <p>Performance Requirements</p> <p>6.1 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>6.2 Manage customer profile and activity record</p> <p>Be able to:</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>6.3 Exhibit professionalism</p> <ul style="list-style-type: none"> ◆ Always ensure all related staff members contribute their greatest effort honestly while managing customer sales and profit records ◆ Always maintain the proper balance of interests between customers and the company as a whole ◆ Always handle customer data in a scientific and objective manner |
| 7. Assessment Criteria | <p>The integrated outcome requirements of this UoC are the abilities to:</p> <ol style="list-style-type: none"> i. successfully provide accurate and timely reports on sales data ii. fulfil the information requirements as requested by different parties iii. permanently record the relevant information and make available for future queries or updates upon request |
| Remark | |