

## MANAGE CUSTOMER RELATIONSHIP

UNIT CODE: BUS/OS/BF/CR/05/6/B

### UNIT DESCRIPTION

This unit specifies the competencies required to manage customer relationship. It involves managing customers' communication, segmenting bank customers, inducting customer into loyalty program and monitoring customer satisfaction.

### ELEMENTS AND PERFORMANCE CRITERIA

ELEMENT  <b>These describe the key outcomes which make up workplace function.</b>	PERFORMANCE CRITERIA  <b>These are assessable statements which specify the required level of performance for each of the elements.</b> <i><b>Bold and italicized terms are elaborated in the range.</b></i>
1. Manage customers communication	1.1 . Communication strategy is developed as per organizational service charter. 1.2 <b>Communication channels</b> are identified as per the customer service charter. 1.3 Communication content is developed as per nature of the customer. 1.4 Feedback mechanism is developed as per customer service charter.
2. Segment bank customers	2.1 Customers are classified as per bank policy 2.2 . Customers are assigned products as per bank policy 2.3 Customers are recognized as per product type 2.4 Customers are informed on their segment as per bank policy 2.5 Customer feedback on their segment is obtained as per bank policy
3. Induct customer into loyalty program	3.1 Loyal customers are identified as per banking policy 3.2 Customers are informed of the loyalty programme as per banking policy 3.3 Loyal customers are registered in loyalty programme as per banking policy
4. Monitor customer satisfaction	4.1 Customers are informed of feedback mechanism as per banking policy 4.2 Customer feedback are analyzed as standard operating procedures 4.3 Course of action is determined as per the nature of the feedback

## RANGE

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

Variable	Range
1. Communication channels may include but not limited to:	<ul style="list-style-type: none"><li>• Emails</li><li>• Telephones</li><li>• Face to face</li><li>• Video conferencing</li></ul>

## REQUIRED KNOWLEDGE AND UNDERSTANDING

The individual needs to demonstrate knowledge of:

- Computer packages
- Bank operational procedures
- Legal operating environment
- Banking policies and procedures
- Customer service knowledge

## SKILLS

The individual needs to demonstrate the following skills:

- Communication skills
- Complaint handling
- Leadership skills
- Team player
- Organizing
- Time management
- Problem solving
- Analytical
- Microsoft word

## EVIDENCE GUIDE

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

1. Critical Aspects of Competency	Assessment requires evidence that the candidate: Demonstrate; 2.1 Manage customer's communication 2.2 Segment customers 2.3 Register loyal customers in loyalty program 2.4 Analyze customer feedback
2. Resource Implications	The following resources should be provided: 2.1 Access to relevant workplace where assessment can take place 2.2 Appropriately simulated environment where assessment can take place
3. Methods of Assessment	Competency may be accessed through: 3.1 Written tests 3.2 Oral questioning 3.3 Third party reports 3.4 Case studies 3.5 Role playing
4. Context of Assessment	Competency may be assessed 4.1 Off the job 4.2 on the job 4.3 During industrial attachment
5. Guidance information for assessment	Holistic assessment with other units relevant to the industry subsector, workplace and job roles is recommended.