IBF Standards:
Checklist Submission

Industry Segment	Future-Enabled Skills
Job Specialisation	Human Centered Design
Objective Statement	Understand how to design products and services from a customer perspective

Competency Unit	1	Customer Mindset (Similar to Technical Skills Competency (TSC): Customer Experience and Relationship Management- Customer Relationship Management)

Proficiency Level: 2

Performance Criteria

1.1.	Perform tasks related to implementation of new CRM capabilities deployment strategies
1.2.	Input data into CRM tools to facilitate downstream tracking of prospective clients, manage accounts and opportunities
1.3.	Use CRM tools to track calls, emails, to-do lists or create email templates
1.4.	Locate and enter leads in CRM tools
1.5.	Add products to leads and opportunities
1.6.	Use reports to track customer accounts that are at risk
1.7.	Maintain records and documentation relating to customer relationships
1.8.	Adapt to any special needs and diversity of customers
1.9.	Monitor customer satisfaction
1.10.	Maintain effective regular communication with customers, collect and check customer information with existing records

Curriculum and Learning Outcomes

- CRM strategies
- Limitations of CRM
- Opportunities of CRM
- Types of CRM technologies and tools
- Processes involved in managing workflows
- Methods for locating and entering leads in CRM tools
- Methods to identify customers' preferences and needs on products and/or services
- Methods used to communicate with customers to identify their preferences and needs
- Processes to maintain record keeping systems
- Various methods of monitoring client satisfaction

Competency Unit	2	Customer Mindset (Similar to Technical Skills Competency (TSC): Customer Experience and Relationship Management- Customer Relationship Management)

Proficiency Level: 3

Performance Criteria

2.1.	Execute plans for implementation of new CRM capabilities deployment strategies

2.2.	Use CRM tools to track prospective clients, manage accounts and opportunities
2.3.	Generate reports on customers' buying history and behaviour
2.4.	Monitor clients metrics and historical customer engagements
2.5.	Engage customers to ensure products and services meet customers' needs
2.6.	Identify opportunities for cross-selling through customer engagement
2.7.	Analyse marketing efforts and its impact on customer relationship

Curriculum and Learning Outcomes

- Types of CRM technologies and tools
- Methods to identify customers' preferences and needs on products and/or services
- Methods to identify potential warm leads
- Customer relationship management frameworks
- Techniques to build positive relationships with customers
- Ways to solicit feedback on products and/or services
- Methods to track client metrics and historical client engagements
- Data sources for customer information
- Data collection methods for different touchpoints along the customer journey

Competency Unit	3	Customer Mindset (Similar to Technical Skills Competency (TSC): Customer Experience and Relationship Management- Customer Relationship Management)

Proficiency Level: 4

Performance Criteria

3.1.	Develop and manage plans for implementing new CRM capabilities
3.2.	Manage and monitor optimisation of CRM tools and technologies
3.3.	Draw and communicate insights from CRM data and fine tune sales processes
3.4.	Develop customer journeys
3.5.	Convert qualified leads to accounts, contacts and opportunities
3.6.	Review existing CRM programmes
3.7.	Develop CRM plans
3.8.	Manage dissatisfied customers or deviant requests
3.9.	Evaluate ROI of client relationships, marketing and communication strategies to develop appropriate client account plans
3.10.	Provide insights into desired marketing mix to build customer relationships

Curriculum and Learning Outcomes

- Criteria for recommending investments in CRM tools and technologies deployment and improving existing practices
- Processes involved in monitoring optimisation of CRM tools and technologies
- Methods for drawing and communicating insights from CRM data
- Criteria for reviewing research findings related to CRM
- Conversion processes for warm leads

•	Communication strategies to maintain positive relationships with customers
•	Techniques to quantify profitability of client relationships
•	Procedures in developing and maintaining positive relationships with customers

Competency Unit	4	Customer Mindset (Similar to Technical Skills Competency (TSC): Customer Experience and Relationship Management- Customer Relationship Management)

Proficiency Level: 5

Performance Criteria

4.1. Define the applications of CRM technologies, tools and practices in the organisation

4.2. Lead identification of current and emerging trends, technologies, competitive landscape and customer expectations in terms of CRM

4.3. Assess and recommend investments in CRM capability areas

4.4. Drive optimisation of CRM tools and technologies to achieve customer acquisition, engagement, retention, loyalty and conversion across all channels and platforms

4.5. Formulate CRM objectives and strategies

4.6. Guide operational plan development to support achievement of customer relationship management strategies

4.7. Set key performance indicators to evaluate CRM

4.8. Formulate relationships with identified key contacts involved in purchasing decisions

4.9. Evaluate client expectations

Curriculum and Learning Outcomes

- Business benefits of CRM

- Current and emerging trends and technologies in CRM

- Competitive landscape in terms of CRM

- Customer expectations in terms of CRM

- Principles for evaluating investments in CRM technologies and tools

- Principles for evaluating effectiveness of CRM technologies and tools

- Customer acquisition, retention, loyalty and conversion

- Techniques for evaluating revenue potential of clients

- Criteria to identify key stakeholders involved in purchasing decisions

- Types of customer centric strategies