Model Curriculum

Associate-CRM

SECTOR: **IT-ITES**
SUB-SECTOR: **BUSINESS PROCESS MANAGEMENT**
OCCUPATION: **CUSTOMER RELATIONSHIP MANAGEMENT (CRM)**
REFERENCE ID: **SSC/Q2202, V1.0**
NSQF LEVEL: **5**

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Associate-CRM

CURRICULUM / SYLLABUS

This program is aimed at training candidates for the job of an "Associate-CRM" in the "IT-ITeS" Sector/Industry and aims at building the following key competencies amongst the learner.

Program Name	Associate-CRM		
Qualification Pack Name & Reference ID.	SSC/Q2202 Version 1.0		
Version No.	1.0	**Version Update Date**	12/10/2018
Pre-requisites to Training	Graduate degree/ diploma in any discipline		
Training Outcomes	**After completing this programme, participants will be able to:** • Collect payments over the telephone. • Convert customer enquiries into sales. • Make outbound telesales calls. • Deal remotely with customer queries. • Manage your work to meet requirements. • Work effectively with colleagues. • Maintain a healthy, safe and secure working environment. • Provide data/information in standard formats. • Develop your knowledge, skills and competence.		

This course encompasses all 9 out of 9 National Occupational Standards (NOS) of "Associate-CRM" Qualification Pack issued by "IT-ITeS Sector Skills Council NASSCOM."

Sr. No.	Module	Key Learning Outcomes	Equipment Required
1.	**Collect payments over the telephone** **Theory Duration** (hh:mm) 15:00 **Practical Duration** (hh:mm) 35:00 **Corresponding NOS Code** SSC/N2308	• Contact customers as per standard operating procedures. • Make collection pitches to customers. • Manage customer queries and objections with appropriate rebuttals. • Negotiate payment terms with customers. • Reach out to concerned authorities for issues outside area of competence. • Update customer relationship management (CRM) with customer interaction as per organization's procedures.	• Access to desktop / laptop; any CRM application, such as Siebel, Zoho. • PC with intranet, internet access and MS-Office/Open office and CRM • Telephone, voice recorder, IVR and software / document formats for recording call / interactions • Mini caselets, Spacious Room / Auditorium • Instant messenger, chat and email tools to enable mock exercises
2.	**Convert customer enquiries into sales** **Theory Duration** (hh:mm) 12:00 **Practical Duration** (hh:mm) 38:00 **Corresponding NOS Code** SSC/N3001	• Identify customer needs from the customer relationship management (CRM) system. • Align suitable products/services to customer needs. • Following standard scripts, make sales pitches to customers. • Answer customer queries and objections. • Up-sell and cross-sell other products/ services to customers. • Post confirmation from customer, capture data for completion of sale	• Access to one or more tools such as Sales Force • PC with intranet, internet access and MS-Office/Open office and CRM • Telephone, voice recorder, IVR and software / document formats for recording call / interactions • Mini caselets, Spacious Room / Auditorium • Instant messenger, chat and email tools to enable mock exercises
3.	**Make outbound telesales calls** **Theory Duration** (hh:mm) 12:00 **Practical Duration** (hh:mm) 38:00 **Corresponding NOS Code** SSC/N3002	• Arrange for customer database from the organization's customer relationship management (CRM) system or the supervisor. • Make sales pitch to customer as per standard operating process. • Cite past history, if the call recipient has been a customer before. • Probe the customer to qualify, establish wants and create the need for your offering. • Interpret customer queries, isolate objections and provide rebuttals, following standard scripts. • Update customer relationship management (CRM) system with the sale made.	• Telephone, voice recorder, IVR and software / document formats for recording call / interactions • Access to desktop / laptop; any CRM application, such as Siebel, Zoho. • PC with intranet, internet access and MS-Office/Open office and CRM • Access to one or more tools such as Sales Force

Sr. No.	Module	Key Learning Outcomes	Equipment Required
			• Instant messenger, chat and email tools to enable mock exercises
4.	**Deal remotely with customer queries** **Theory Duration** (hh:mm) 15:00 **Practical Duration** (hh:mm) 35:00 **Corresponding NOS Code** SSC/N3003	• Build good rapport with the customer. • Summarize and reconfirm customer queries. • Empathize with the customer and indicate your commitment to resolving their queries. • Use organization's tool to keep track of the customer query • Leverage organization internal resources to find a resolution. • Post resolution, obtain confirmation from customers and update the organization tracker tool.	• Access to desktop / laptop; any CRM application, such as Siebel, Zoho. • PC with intranet, internet access and MS-Office/Open office and CRM • Telephone, voice recorder, IVR and software / document formats for recording call / interactions • Instant messenger, chat and email tools to enable mock exercises
5.	**Manage your work to meet requirements** **Theory Duration** (hh:mm) 12:00 **Practical Duration** (hh:mm) 38:00 **Corresponding NOS Code** SSC/N9001	• Come to an understanding of your work requirements, output, targets with appropriate people as per organization policy. • Use your time and resources judiciously • Keep the workplace clean and operate in a tidy environment. • Treat confidential information correctly.	• Whiteboard and Markers • LCD Projector and Laptop for presentations • Training organization's confidentiality policy
6.	**Work effectively with colleagues** **Theory Duration** (hh:mm) 10:00 **Practical Duration** (hh:mm) 40:00 **Corresponding NOS Code** SSC/N9002	• Communicate with colleagues clearly, concisely and accurately. • Work with colleagues to integrate your work effectively with theirs. • Pass on essential information to colleagues in a timely manner. • Treat people with courtesy, politeness, and kindness, reflecting respect for colleagues. • Inform colleagues in advance if unable to meet deadlines indicating the reasons. • Resolve any conflicts with colleagues amicably. • Understand teamwork, multitasking, cooperation, co-ordination and collaboration.	• Whiteboard and Markers • LCD Projector and Laptop for presentations • Provision to write emails and send in the lab • Lab with provision for internet, email, word processor and presentation software • Chart paper, markers, picture magazines and old newspapers
7.	**Maintain a healthy, safe and secure working environment** **Theory Duration** (hh:mm) 07:00	• Comply/adhere with your organization's current health, safety and security policies and procedures. • Know correct emergency procedures. • Report to supervisor or authorised personnel if any hazard is identified.	• Whiteboard and Markers • LCD Projector and Laptop for presentations • The training organization's current health, safety and security policies and procedures

Sr. No.	Module	Key Learning Outcomes	Equipment Required
	Practical Duration (hh:mm) 18:00 **Corresponding NOS Code** SSC/N9003		• A sample health and safety policy document • Emergency broadcast system and mock emergency signage in the appropriate areas of the training institute
8.	**Provide data/ information in standard formats** **Theory Duration** (hh:mm) 12:00 **Practical Duration** (hh:mm) 38:00 **Corresponding NOS Code** SSC/N9004	• Obtain accurate and up-to-date data/ information in prescribed format from reliable sources. • Report any unresolved anomalies in the data/information to appropriate people.	• Whiteboard and Markers • LCD Projector and Laptop for presentations • Provision for online research in the lab
9.	**Develop your knowledge, skills and competence** **Theory Duration** (hh:mm) 05:00 **Practical Duration** (hh:mm) 20:00 **Corresponding NOS Code** SSC/N9005	• Benchmark your current level of knowledge, skills and competence against your job role • Plan appropriately any learning and development needs with concerned people. • Apply acquired new knowledge and skills in the workplace, under supervision.	• Whiteboard and Markers • LCD Projector and Laptop for presentations • Provision for online access to all students in the lab
	Total Duration **Theory Duration 100:00** **Practical Duration 300:00**	**Unique Equipment Required:** • Whiteboard and Markers, LCD Projector and Laptop for presentations, Chart paper • Lab equipped with the following: PCs/Laptops and Internet with WiFi (Min 2 Mbps Dedicated), provision for email, word processor and presentation software. CRM application, such as Siebel, Zoho, Social networking tool / LMS tool to enable blog posts or discussion board, Instant messenger, chat and email tools to enable mock exercises • A sample health and safety policy document, Emergency broadcast system and mock emergency signage in the appropriate areas of the training institute • Supporting software / applications for projecting audio, video, recording, • Microphone / voice system for lecture and class activities • Handy Camera, Stationery kit – Staples, Glue, Chart Paper, Sketch Pens, Paint Box, Scale, A4 Sheets	

Sr. No.	Module	Key Learning Outcomes	Equipment Required
		• For IT Lab sessions: Computer Lab with 1:1 PC:trainee ratio and having internet connection, MS Office / Open office, Browser, Outlook / Any other Email Client and chat tools. • Assessment and Test Tools for day to day online Tests and Assessments • Reading Resources: Access to relevant sample documents and learning forums to enable self-study before and after each training session.	

Grand Total Course Duration: **400 Hours 0 Minutes**

(*This syllabus/ curriculum has been approved* **IT-ITeS Sector Skills Council NASSCOM**.)

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Trainer Prerequisites for Job role: "Associate-CRM" mapped to Qualification Pack: "SSC/Q2202 Version 1.0"

Sr. No.	Area	Details
1	Job Description	To deliver accredited training service, mapping to the curriculum detailed above, in accordance with the Qualification Pack "SSC/Q2202 V1.0"
2	Personal Attributes	Aptitude to conduct training, and pre/ post work to ensure competent, employable candidates at the end of the training. Strong communication skills, interpersonal skills, ability to work as part of a team; a passion for quality and for developing others; well-organised and focused, eager to learn and keep oneself updated with the latest in the mentioned field. This job requires the individual to work independently and interact with customers. The individual should be result oriented and should also be able to demonstrate logical thinking and interpersonal skills and should have good typing speed.
3	Minimum Educational Qualifications	Graduate degree/ diploma in any discipline
4a	Domain Certification	Certified for Job Role: "Associate CRM" mapped to QP "SSC/Q2202 V1.0". Minimum accepted score is 80% Additional certification in customer orientation, dealing with difficult customers, Telephone etiquettes, voice & accent, basic computer skills, cross-culture, etc.
4b	Platform Certification	Recommended that the trainer is certified for the Job role "Trainer" mapped to the Qualification Pack "MEP/Q0102". Minimum accepted score is 80% aggregate.
5	Experience	Field experience: Minimum 2 years' experience in the same domain Training experience: 1 year preferred

Assessment Criteria

Assessment Criteria	
Job Role	Associate-CRM
Qualification Pack	SSC/Q2202, V1.0
Sector Skill Council	IT-ITeS

Sr. No.	Guidelines for Assessment
1	Criteria for assessment for each Qualification Pack (QP) will be created by the Sector Skill Council (SSC). Each performance criteria (PC) will be assigned Theory and Skill/Practical marks proportional to its importance in NOS.
2	The assessment will be conducted online through assessment providers authorised by SSC.
3	Format of questions will include a variety of styles suitable to the PC being tested such as multiple choice questions, fill in the blanks, situational judgment test, simulation and programming test.
4	To pass a QP, a trainee should pass each individual NOS. Standard passing criteria for each NOS is 70%.
5	For latest details on the assessment criteria, please visit www.sscnasscom.com.

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Assessable outcomes	Assessment criteria for the outcome	Total Mark	Out of	Marks Allocation	
				Theory	Skills Practical
1.SSC/N2308 (Collect payments over the telephone)	PC1. establish contact with customers, following your organization's procedures	**100**	10	10	0
	PC2. introduce yourself and the purpose of your call, following standard scripts		10	0	10
	PC3. verify customer details and account status, following your organization's procedures		10	0	10
	PC4. make collections pitches to customers following standard scripts		10	0	10
	PC5. Handle customer queries, objections and rebuttals following standard scriptsPC6. negotiate payment terms with customers, within the limits of your competence and authority		10	0	10
	PC6. refer issues outside your area of competence and authority to appropriate people, following your organization's procedures		10	10	0
	PC7. confirm with customers their commitment to make payments		10	0	10
	PC8. obtain required financial information from customers, following your organization's procedures		10	10	0
	PC9. update customer account status, following your organization's procedures		10	0	10
	PC10. comply with relevant standards, policies, procedures and guidelines when collecting payments over the telephone		10	0	10
	Total		100	30	70
2.SSC/N3001 (Convert customer enquiries into sales)	PC1. use information provided by customers or accessed from the customer relationship management (CRM) system to identify any needs	**100**	10	10	0
	PC2. identify suitable products/services to meet needs		10	0	10
	PC3. make convincing sales pitches to customers following standard scripts		10	0	10
	PC4. handle customer queries, objections and rebuttals following standard scripts		10	0	10
	PC5. adapt your approach and style to customer preferences, within the limits of your competence and authority		10	0	10
	PC6. refer issues outside your area of competence and authority to appropriate people, following your organization's procedures		10	10	0
	PC7. identify and act on opportunities to up-sell or cross-sell other products/ services to customers		10	0	10
	PC8. confirm customer wishes and needs in order to close sales		5	0	5
	PC9. obtain required financial information from customers, following your organization's procedures		5	5	0

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Assessable outcomes	Assessment criteria for the outcome	Total Mark	Out of	Marks Allocation	
				Theory	Skills Practical
	PC10. complete your organization's post-sales procedures in order to complete/ fulfill sales		10	0	10
	PC11. comply with relevant standards, policies, procedures and guidelines when converting customer enquiries into sales		10	0	10
		Total	100	25	75
3. SSC/N3002 (Make outbound telesales calls)	PC1. establish contact with customers, following your organization's procedures		10	10	0
	PC2. introduce yourself and the purpose of your call, following standard scripts		5	0	5
	PC3. obtain information from customers to identify their needs		5	0	5
	PC4. make convincing sales pitches to customers following standard scripts		10	0	10
	PC5. handle customer queries, objections and rebuttals following standard scripts		10	0	10
	PC6. adapt your approach and style to customer preferences, within the limits of your competence and authority	100	10	0	10
	PC7. refer issues outside your area of competence and authority to appropriate people, following your organization's procedures		10	0	10
	PC8. identify and act on opportunities to up-sell or cross-sell other products/ services to customers		10	10	0
	PC9. confirm customer wishes and needs in order to close sales		5	0	5
	PC10. obtain required financial information from customers, following your organization's procedures		5	5	0
	PC11. complete your organization's post-sales procedures in order to complete/ fulfill sales		10	0	10
	PC12. comply with relevant standards, policies, procedures and guidelines when making outbound telesales calls		10	0	10
		Total	100	25	75
4.SSC/N3003 (Deal remotely with customer queries)	PC1. greet customers and verify their details, following your organization's procedures		5	0	5
	PC2. listen carefully to customers and ask appropriate questions to understand the nature of queries		5	0	5
	PC3. summarize, and obtain customer confirmation of, your understanding of queries	100	10	0	10
	PC4. express your concern for any difficulties caused and your commitment to resolving queries		10	0	10
	PC5. record and categorize queries accurately using your organization's query management tool		10	0	10

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Assessable outcomes	Assessment criteria for the outcome	Total Mark	Out of	Marks Allocation	
				Theory	Skills Practical
	PC6. refer queries outside your area of competence or authority promptly to appropriate people		10	10	0
	PC7. access your organization's knowledge base for solutions to queries, where available		10	0	10
	PC8. resolve queries within your area of competence or authority in line with organizational guidelines and service level agreements (SLAs)		10	10	0
	PC9. obtain advice and guidance from appropriate people, where necessary		5	5	0
	PC10. obtain confirmation from customers that queries have been resolved to their satisfaction		5	5	0
	PC11. record the resolution of queries accurately using your organization's query management tool		10	0	10
	PC12. comply with relevant standards, policies, procedures and guidelines when dealing remotely with customer queries		10	0	10
	Total		100	30	70
5.SSC/N9001 (Manage your work to meet requirements)	PC1. establish and agree your workrequirements with appropriate people	**100**	6.25	0	6.25
	PC2. keep your immediate work area clean and tidy		12.5	6.25	6.25
	PC3. utilize your time effectively		12.5	6.25	6.25
	PC4. use resources correctly and efficiently		18.75	6.25	12.5
	PC5. treat confidential information correctly		6.25	0	6.25
	PC6. work in line with your organization's policies and procedures		12.5	0	12.5
	PC7. work within the limits of your job role		6.25	0	6.25
	PC8. obtain guidance from appropriate people, where necessary		6.25	0	6.25
	PC9. ensure your work meets the agreed requirements		18.75	6.25	12.5
	Total		100	25	75
6.SSC/N9002 (Work effectively with colleagues)	PC1. communicate with colleagues clearly, concisely and accurately	**100**	20	0	20
	PC2. work with colleagues to integrate your work effectively with theirs		10	0	10
	PC3. pass on essential information to colleagues in line with organizational requirements		10	10	0
	PC4. work in ways that show respect for colleagues		20	0	20
	PC5. carry out commitments you have made to colleagues		10	0	10

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				Theory	Skills Practical
	PC6. let colleagues know in good time if you cannot carry out your commitments, explaining the reasons		10	10	0
	PC7. identify any problems you have working with colleagues and take the initiative to solve these problems		10	0	10
	PC8. follow the organization's policies and procedures for working with colleagues		10	0	10
		Total	100	20	80
7.SSC/N9003 (Maintain a healthy, safe and secure working environment)	PC1. comply with your organization's current health, safety and security policies and procedures	100	20	10	10
	PC2. report any identified breaches in health, safety, and security policies and procedures to the designated person		10	0	10
	PC3. identify and correct any hazards that you can deal with safely, competently and within the limits of your authority		20	10	10
	PC4. report any hazards that you are not competent to deal with to the relevant person in line with organizational procedures and warn other people who may be affected		10	0	10
	PC5. follow your organization's **emergency procedures** promptly, calmly, and efficiently		20	10	10
	PC6. identify and recommend opportunities for improving health, safety, and security to the designated person		10	0	10
	PC7. complete any health and safety records legibly and accurately		10	0	10
		Total	100	30	70
8.SSC/N9004 (Provide data/information in standard formats)	PC1. establish and agree with appropriate people the data/information you need to provide, the formats in which you need to provide it, and when you need to provide it	100	12.5	12.5	0
	PC2. obtain the data/information from reliable sources		12.5	0	12.5
	PC3. check that the data/information is accurate, complete and up-to-date		12.5	6.25	6.25
	PC4. obtain advice or guidance from appropriate people where there are problems with the data/information		6.25	0	6.25
	PC5. carry out rule-based analysis of the data/information, if required		25	0	25
	PC6. insert the data/information into the agreed formats		12.5	0	12.5
	PC7. check the accuracy of your work, involving colleagues where required		6.25	0	6.25
	PC8. report any unresolved anomalies in the data/information to appropriate people		6.25	6.25	0

Assessable outcomes	Assessment criteria for the outcome	Total Mark	Out of	Marks Allocation	
				Theory	**Skills Practical**
	PC9. provide complete, accurate and up-to-date data/information to the appropriate people in the required formats on time		6.25	0	6.25
		Total	100	25	75
9.SSC/N9005 (Develop your knowledge, skills and competence)	PC1. obtain advice and guidance from appropriate people to develop your knowledge, skills and competence	**100**	10	0	10
	PC2. identify accurately the knowledge and skills you need for your job role		10	0	10
	PC3. identify accurately your current level of knowledge, skills and competence and any learning and development needs		20	10	10
	PC4. agree with appropriate people a plan of learning and development activities to address your learning needs		10	0	10
	PC5. undertake learning and development activities in line with your plan		20	10	10
	PC6. apply your new knowledge and skills in the workplace, under supervision		10	0	10
	PC7. obtain feedback from appropriate people on your knowledge and skills and how effectively you apply them		10	0	10
	PC8. review your knowledge, skills and competence regularly and take appropriate action		10	0	10
		Total	100	20	80