

## CFAM7.1.6

# Monitor and control relationship management activities



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### Overview

This is about monitoring and controlling customer relationships, in order to maintain or control the level of service offered, or initiate change to product/service offerings to meet the changing needs and expectations of key customers.

You are expected to identify current methods of obtaining feedback and information to support monitoring activities, and to ensure that feedback on customer service is actively sought and acted upon.

This unit is recommended for marketing/sales team members involved in the monitoring and control of key customer relationships, ensuring mutually beneficial sales success.

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#### Performance criteria

*You must be able to:*

- P1 consult with customers on the most appropriate forms of feedback systems suitable for the key customer relationship
- P2 identify current methods of obtaining customer feedback, and ensure that the methods are evaluated and improved where necessary to establish methods mutually beneficial to all involved in the monitoring process
- P3 establish information requirements of both qualitative and quantitative nature relating to customer feedback, ensuring that it is examined for relevance to own area of responsibility
- P4 select the most appropriate methods of feedback for monitor and control purposes, including informal and formal systems for monitoring of key customer activities
- P5 develop criteria to determine monitoring and control activities that need to be undertaken
- P6 set up procedures and processes to support the monitoring and control activities in agreement with key customer
- P7 identify key stakeholders to be involved in the monitoring process, ie those inside the organisation and those from the key customer organisation, and any independent members
- P8 establish technology and software requirements for monitoring and feedback purposes
- P9 determine the types of reporting requirements, frequency, types of reports, nature of reports and target audience for reports
- P10 identify effective ways of communicating with others during monitoring and control activities, and subsequently, to act upon feedback and information
- P11 identify and evaluate key analysis techniques to be used to analyse information obtained during monitoring and control process
- P12 upon collection of feedback, identify key strengths and weaknesses of the relationship and areas for improvement
- P13 establish key variances in customer feedback, identify reasons for them and consider key implications of them for the future of the key customer relationship
- P14 identify the methods that could be used to establish key improvements in the level of service provided
- P15 establish at whom the feedback should be targeted and recommendations made

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#### Knowledge and understanding

*You need to know and understand:*

##### **General knowledge and understanding**

- K1 the concept of monitoring and control and why it is critical to maintaining and enhancing key account relationships
- K2 various methods and processes for obtaining customer feedback
- K3 the difference between formal and informal ways of gaining feedback and how to use the information effectively
- K4 the types of information required for monitoring and controlling purposes – including qualitative and quantitative information
- K5 the key stakeholders who typically should be involved in the monitoring and control process
- K6 effective ways of communicating and consulting with others
- K7 available technology, software and systems available for collating and collecting customer feedback
- K8 different methods available for analysing formal and informal feedback
- K9 how to store and retrieve customer feedback information safely and easily
- K10 ways in which to provide analysed information and the various reporting techniques that can be used to provide formalised feedback
- K11 techniques used for presenting feedback to others
- K12 how to motivate those people involved in the process to be proactive and effective in monitoring and control activities
- K13 ways of influencing others to respond to customer feedback and improve levels of service
- K14 the methods used to manage monitoring and control feedback processes
- K15 ways in which the information can be used to affect marketing/sales support and customer service improvements

##### **Industry/sector specific knowledge and understanding**

- K16 legislative issues relating to monitoring and feedback issues
- K17 issues relating to confidentiality of information
- K18 ethical issues associated with collection of customer information
- K19 internal and external issues that could impact upon the type of information obtained

##### **Context specific knowledge and understanding**

- K20 existing account arrangements for key customer relationships
- K21 key objectives and targets relating to the performance of the key customer relationship
- K22 customer and organisational requirements for monitoring and control activities
- K23 current sales organisation practices relating to monitoring and controlling

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- key customer activities
- K24 available technology, software and systems available for monitoring and control purposes
- K25 organisational report formats used for monitoring and controlling key customer activities
- K26 own remit and scope of own area of responsibility
- K27 current methods used for analysing and presenting customer feedback information for monitoring and control purposes
- K28 methods for managing marketing/sales support/customer service improvements
- K29 methods for dealing with considerable variances in performance
- K30 approaches to continuous monitoring and control of marketing/sales activities in key customer relationships

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#### Additional Information

##### Behaviours

1. articulate clearly the need for feedback as a mechanism for monitoring and controlling of key customer relationships
2. work with others to establish the most appropriate methods of feedback for monitoring and controlling purposes
3. offer advice, ideas and information for feedback activities that are mutually beneficial to all stakeholders
4. work to overcome barriers to feedback and monitoring activities
5. demonstrate flexibility and commitment to the process
6. modify monitoring and controlling activities at the request of key stakeholders
7. proactively seek informal feedback
8. motivate others to participate fully in the monitoring process
9. influence internal stakeholders to improve customer service as a result of monitoring and control activities
10. communicate effectively and to the right stakeholder key information relevant to current and future developments
11. manage existing and new processes relevant to your own area of responsibility
12. act within own area of responsibility
13. show integrity and be ethical at all times through the process

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<b>Developed by</b>	CFA Business Skills @ Work
<b>Version number</b>	1
<b>Date approved</b>	April 2010
<b>Indicative review date</b>	April 2012
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	CFA Business Skills @ Work
<b>Original URN</b>	NM7.1.6
<b>Relevant occupations</b>	1132 Marketing & Sales Managers 3543 Marketing Associates
<b>Suite</b>	Marketing
<b>Key words</b>	Marketing, sales, marketing management, market research, advertising, public relations