

Model Curriculum

Associate-CRM

Associate-CRM

SECTOR: IT-ITeS
SUB-SECTOR: **Business Process Management**
OCCUPATION: **Customer Relationship Management (CRM)**
REFERENCE ID: **SSC/Q2202**
NSQF LEVEL: 5

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Associate-CRM

Curriculum / Syllabus

This program is aimed at training candidates for the job of a **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.	Associate-CRM SSC/Q2202		
Version No.	1.0	Version Update Date	31/01/2015
Pre-requisites to Training	Graduate degree/ diploma in any discipline		
Training Outcomes	<p>After completing this programme, participants will be able to:</p> <ul style="list-style-type: none"> • 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 Nine National Occupational Standards (NOS) of **Associate-CRM** Qualification Pack issued by **IT-ITeS Sector Skills Council NASSCOM**.

Sr. No.	Module	Theory Duration (hh:mm)	Practical Duration (hh:mm)	Key Learning Outcomes	Corresponding NOS Code	Equipment Required
1.	Collect payments over the telephone	15:00	35:00	Candidates will be able to: <ul style="list-style-type: none"> • establish contact with customers, following your organization's procedures • introduce yourself and the purpose of your call, following standard scripts • verify customer details and account status, following your organization's procedures • make collections pitches to customers following standard scripts • Handle customer queries, objections and rebuttals following standard scripts • negotiate payment terms with customers, within the limits of your competence and authority • refer issues outside your area of competence and authority to 	SSC/N2308	Refer to Unique Equipment Required

Sr. No.	Module	Theory Duration (hh:mm)	Practical Duration (hh:mm)	Key Learning Outcomes	Corresponding NOS Code	Equipment Required
				<p>appropriate people, following your organization's procedures</p> <ul style="list-style-type: none"> confirm with customers their commitment to make payments obtain required financial information from customers, following your organization's procedures update customer account status, following your organization's procedures comply with relevant standards, policies, procedures and guidelines when collecting payments over the telephone 		
2.	Convert customer enquiries into sales	12:00	38:00	<p>Candidates will be able to:</p> <ul style="list-style-type: none"> use information provided by customers or accessed from the customer relationship management (CRM) system to identify any needs identify suitable products/services to meet needs make convincing sales pitches to customers following standard scripts handle customer queries, objections and rebuttals following standard scripts adapt your approach and style to customer preferences, within the limits of your competence and authority refer issues outside your area of competence and authority to appropriate people, following your organization's procedures identify and act on opportunities to up-sell or cross-sell other products/ services to customers confirm customer wishes and needs in order to close sales obtain required financial information from customers, following your organization's procedures complete your organization's post-sales procedures in order to complete/ fulfill sales 	SSC/N3001	

Sr. No.	Module	Theory Duration (hh:mm)	Practical Duration (hh:mm)	Key Learning Outcomes	Corresponding NOS Code	Equipment Required
				<ul style="list-style-type: none"> • comply with relevant standards, policies, procedures and guidelines when converting customer enquiries into sales 		
3.	Make outbound telesales calls	12:00	38:00	<p>Candidates will be able to:</p> <ul style="list-style-type: none"> • establish contact with customers, following your organization’s procedures • introduce yourself and the purpose of your call, following standard scripts • obtain information from customers to identify their needs • make convincing sales pitches to customers following standard scripts • handle customer queries, objections and rebuttals following standard scripts • adapt your approach and style to customer preferences, within the limits of your competence and authority • refer issues outside your area of competence and authority to appropriate people, following your organization’s procedures • identify and act on opportunities to up-sell or cross-sell other products/ services to customers • confirm customer wishes and needs in order to close sales • obtain required financial information from customers, following your organization’s procedures • complete your organization’s post-sales procedures in order to complete/ fulfill sales • comply with relevant standards, policies, procedures and guidelines when making outbound telesales calls 	SSC/N3002	
4.	Deal remotely with customer queries	15:00	35:00	<p>Candidates will be able to:</p> <ul style="list-style-type: none"> • greet customers and verify their details, following your organization’s procedures • listen carefully to customers and ask appropriate questions to understand the nature of queries • summarize, and obtain customer confirmation of, your understanding of queries 	SSC/N3003	

Sr. No.	Module	Theory Duration (hh:mm)	Practical Duration (hh:mm)	Key Learning Outcomes	Corresponding NOS Code	Equipment Required
				<ul style="list-style-type: none"> • express your concern for any difficulties caused and your commitment to resolving queries • record and categorize queries accurately using your organization's query management tool • refer queries outside your area of competence or authority promptly to appropriate people • access your organization's knowledge base for solutions to queries, where available • resolve queries within your area of competence or authority in line with organizational guidelines and service level agreements (SLAs) • obtain advice and guidance from appropriate people, where necessary • obtain confirmation from customers that queries have been resolved to their satisfaction • record the resolution of queries accurately using your organization's query management tool • comply with relevant standards, policies, procedures and guidelines when dealing remotely with customer queries 		
5.	Manage your work to meet requirements	12:00	38:00	<p>Candidates will be able to:</p> <ul style="list-style-type: none"> • establish and agree your work requirements with appropriate people • keep your immediate work area clean and tidy • utilize your time effectively • use resources correctly and efficiently • treat confidential information correctly • work in line with your organization's policies and procedures • work within the limits of your job role • obtain guidance from appropriate people, where necessary 	SSC/N9001	

Sr. No.	Module	Theory Duration (hh:mm)	Practical Duration (hh:mm)	Key Learning Outcomes	Corresponding NOS Code	Equipment Required
				<ul style="list-style-type: none"> ensure your work meets the agreed requirements 		
6.	Work effectively with colleagues	10:00	40:00	<p>Candidates will be able to:</p> <ul style="list-style-type: none"> communicate with colleagues clearly, concisely and accurately work with colleagues to integrate your work effectively with theirs pass on essential information to colleagues in line with organizational requirements work in ways that show respect for colleagues carry out commitments you have made to colleagues let colleagues know in good time if you cannot carry out your commitments, explaining the reasons identify any problems you have working with colleagues and take the initiative to solve these problems follow the organization's policies and procedures for working with colleagues 	SSC/N9002	
7.	Maintain a healthy, safe and secure working environment	7:00	18:00	<p>Candidates will be able to:</p> <ul style="list-style-type: none"> comply with your organization's current health, safety and security policies and procedures report any identified breaches in health, safety, and security policies and procedures to the designated person identify and correct any hazards that you can deal with safely, competently and within the limits of your authority 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 follow your organization's emergency procedures promptly, calmly, and efficiently identify and recommend opportunities for improving health, safety, and security to the designated person complete any health and safety records legibly and accurately 	SSC/N9003	
8.	Provide data/information	12:00	38:00	<p>Candidates will be able to:</p> <ul style="list-style-type: none"> establish and agree with appropriate people the 	SSC/N9004	

Sr. No.	Module	Theory Duration (hh:mm)	Practical Duration (hh:mm)	Key Learning Outcomes	Corresponding NOS Code	Equipment Required
	in standard formats			<p>data/information you need to provide, the formats in which you need to provide it, and when you need to provide it</p> <ul style="list-style-type: none"> • obtain the data/information from reliable sources • check that the data/information is accurate, complete and up-to-date • obtain advice or guidance from appropriate people where there are problems with the data/information • carry out rule-based analysis of the data/information, if required • insert the data/information into the agreed formats • check the accuracy of your work, involving colleagues where required • report any unresolved anomalies in the data/information to appropriate people • provide complete, accurate and up-to-date data/information to the appropriate people in the required formats on time 		
9.	Develop your knowledge, skills and competence	5:00	20:00	<p>Candidates will be able to:</p> <ul style="list-style-type: none"> • obtain advice and guidance from appropriate people to develop your knowledge, skills and competence • identify accurately the knowledge and skills you need for your job role • identify accurately your current level of knowledge, skills and competence and any learning and development needs • agree with appropriate people a plan of learning and development activities to address your learning needs • undertake learning and development activities in line with your plan • apply your new knowledge and skills in the workplace, under supervision 	SSC/N9005	

Sr. No.	Module	Theory Duration (hh:mm)	Practical Duration (hh:mm)	Key Learning Outcomes	Corresponding NOS Code	Equipment Required
				<ul style="list-style-type: none"> • obtain feedback from appropriate people on your knowledge and skills and how effectively you apply them • review your knowledge, skills and competence regularly and take appropriate action 		
	<p>Total Duration:</p>	<p><u>100:00</u></p>	<p><u>300:00</u></p>	<p>Unique Equipment Required: Training room should be fully furnished with the following equipment / tools / accessories. Additional / specific resources, wherever applicable (e.g. Hardware, software) are indicated in the main text corresponding to relevant learning outcome.</p> <p>Domain NOS requirements</p> <ul style="list-style-type: none"> • Access to desktop / laptop; any CRM application, such as Siebel, Zoho. • Access to one or more tools such as Sales Force • Wi-fi for students to connect the recommended online resources on their personal devices • PC with intranet, internet access and MS-Office/Open office and CRM • Read / write access to any social forum such as facebook group, blog, LMS based discussion forum • 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 <p>Common requirements</p> <ul style="list-style-type: none"> • Comfortable seats with adequate lighting, controlled temperature and acoustics for training and learning • White Board, Markers and Eraser • Projector with screen • Flip chart with markers • Faculty's PC/Laptop with latest configuration and internet connection • Supporting software / applications for projecting audio, video, recording, • Presentation Tools to support learning activities: <ul style="list-style-type: none"> ○ Intranet ○ Email ○ IMs ○ Learning management system e.g. Moodle, Blackboard to enable blended learning • 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	Theory Duration (hh:mm)	Practical Duration (hh:mm)	Key Learning Outcomes	Corresponding NOS Code	Equipment Required
				<ul style="list-style-type: none"> 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 For team discussions: Adequate seating arrangement in full / half circle format for one or more teams as per planned team composition. 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.)

Notes from IT-ITeS Sector Skills Council NASSCOM

- This document outlines the broad scope of coverage. This should be linked with OBF and training delivery plan. OBF (Outcome based framework) reflects the pedagogy used to ensure an expected outcome. Training delivery plan focuses on the sequence of delivery.
- Though many NOSs have some seemingly common outcomes, notably core/generic, professional and technical skills, it is imperative to understand the contextual difference between them. Training providers are advised to,
 - Embed such skills development in the learning pedagogy for each expected outcome
 - Prepare a detailed session plan for training delivery with focus on sequence and duration of training
- Run a diagnostic test to assess prior learning of students and help trainers / students identify the need for gap training and suitable training methodology. Accordingly, more introductory level sessions may be included in guided or self-paced mode of learning. E.g. adding some sessions on Functional English or Use of Internet and MS Office.

Annexure1: Assessment Criteria

Assessment Criteria for <QP Name>	
Job Role	Associate-CRM
Qualification Pack	SSC/Q2202
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 .

Assessable outcomes	Assessment criteria for the outcome	Total Mark	Out of	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 scripts		10	0	10
	PC6. negotiate payment terms with customers, within the limits of your competence and authority		10	10	0
	PC6. refer issues outside your area of competence and authority to appropriate people, following your organization’s procedures		10	0	10
	PC7. confirm with customers their commitment to make payments		10	10	0
	PC8. obtain required financial information from customers, following your organization’s procedures		10	0	10
	PC9. update customer account status, following your organization’s procedures		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

Assessable outcomes	Assessment criteria for the outcome	Total Mark	Out of	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	100	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		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
4. SSC/N3003 (Deal remotely with customer queries)	PC1. greet customers and verify their details, following your organization's procedures	100	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		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
	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

Assessable outcomes	Assessment criteria for the outcome	Total Mark	Out of	Theory	Skills Practical
	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 work requirements 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
	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

Assessable outcomes	Assessment criteria for the outcome	Total Mark	Out of	Theory	Skills Practical
	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
	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

Annexure2: Trainer Prerequisites for Job role: Associate-CRM mapped to Qualification Pack: SSC/Q2202

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.
2	Personal Attributes	<p>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.</p> <p>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.</p>
3	Minimum Educational Qualifications	Graduate degree/ diploma in any discipline
4a	Domain Certification	<p>Minimum accepted score in SSC Assessment is 90% per NOS being taught in SSC/Q2202.</p> <p>Additional certification in customer orientation, dealing with difficult customers, Telephone etiquettes, voice & accent, basic computer skills, cross-culture, etc.</p>
4b	Platform Certification	<p>Recommended that the Trainer is certified for the Job Role: "Trainer" mapped to the Qualification Pack: "SSC/Q1402".</p> <p>Minimum accepted score is 70% per NOS.</p>
5	Experience	<p>Field experience: Minimum 2 years' experience in the same domain</p> <p>Training experience: 1 year preferred</p>



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