



## QUALIFI ASSESSMENT DOCUMENT

Qualification	Qualifi Level 5 Diploma in Business Management
Qualification No (RQF)	601/6049/4
Unit Name	Customer Management
Unit Reference	BUS 2.5

## **Introduction**

Prior to attempting this coursework assignment, Learners must familiarise themselves with the following policies:

- Centre Specification
- Qualifi Quality Assurance Standards
- Qualifi Quality Policy Statement

## **Plagiarism and Collusion**

In submitting the assignment Learner's must complete a statement of authenticity confirming that the work submitted for all tasks is their own. The statement should also include the word count.

Your accredited study centre will direct you to the appropriate software that checks the level of similarity.

Plagiarism and collusion are treated very seriously. Plagiarism involves presenting work, excerpts, ideas or passages of another author without appropriate referencing and attribution.

Collusion occurs when two or more learners submit work which is so alike in ideas, content, wording and/or structure that the similarity goes beyond what might have been mere coincidence

Please familiarise yourself on Qualifi's Malpractice and Maladministration policy, where you can find further information

## **Referencing**

A professional approach to work is expected from all learners. Learners must therefore identify and acknowledge ALL sources/methodologies/applications used.

The learner must use an appropriate referencing system to achieve this. Marks are not awarded for the use of English; however, the learner must express ideas clearly and ensure that appropriate terminology is used to convey accuracy in meaning.

Qualifi recommends using Harvard Style of Referencing throughout your work.

## **Appendices**

You may include appendices to support your work, however appendices must only contain additional supporting information, and must be clearly referenced in your assignment.

You may also include tables, graphs, diagrams, Gantt chart and flowcharts that support the main report should be incorporated into the back of the assignment report that is submitted.

Any published secondary information such as annual reports and company literature, should be referenced in the main text of the assignment, in accordance of Harvard Style Referencing, and referenced at the end of the assignment.

## **Confidentiality**

Where a Learner is using organisational information that deals with sensitive material or issues, they must seek the advice and permission from that organisation about its inclusion.

Where confidentiality is an issue, Learners are advised to anonymise their assignment report so that it cannot be attributed to that particular organisation.

## **Word Count Policy**

Learners must comply with the required word count, within a margin of +10%. These rules exclude the index, headings, tables, images, footnotes, appendices and information contained within references and bibliographies.

When an assessment task requires learners to produce presentation slides with supporting notes, the word count applies to the supporting notes only.

## **Submission of Assignments**

All work to be submitted on the due date as per Centre's advice.

All work must be submitted in a single electronic document (.doc file).

This should go to the tutor and Centre Manager/Programme Director, plus one hard copy posted to the Centre Manager (if required)

## **Marking and grades**

Qualifi uses a standard marking rubric for all assignments, and you can find the details at the end of this document.

Unless stated elsewhere, Learners must answer all questions in this document.

## Assignment Question

### Scenario

Learners may use their own employment context to write an assignment based on assessment tasks. Assessment tasks are learning outcomes of the unit associated with Assessment Criteria. You are required to generate sufficient evidence on assessment criteria to meet learning outcomes of the unit within the rules, regulations and standards to achieve credits of the unit. If you are not in employment, please use the following scenario.

Customer Relationship Management (CRM) is now being actively embraced by organisations within most industry sectors. Furthermore, customer expectations are changing with the result that customer relationships are becoming increasingly more complex to manage. Consider you are working as a Customer Relationship Manager of a small-medium sized insurance private limited organisation, which deals with its customers all over the world to sell its motor, home, life, savings and retirement insurance products and services. Your role includes understanding customers, meeting customer need and adding value. You are asked by Directors to write a report to meet learning objectives of following three assessment tasks, where you should identify analyses how the organisation have responded by looking after their customer base in new and more cost-effective ways. You are also asked to make suitable recommendations to improve your organisation approaches to customers in order to meet their needs in competitive market environment.

## **Task 1**

Examine the different ways that organisations deal with their customers.

**1.1:** Explain the different approaches to analysing customer behaviour and identifying patterns.

**1.2:** Explain the different approaches to segmenting customers and identifying target groups.

## **Assessment Criteria**

**1.1:** Analyse customer behaviour and identify patterns and differences in approach.

**1.2:** Segment customers and identify target groups.

## **Task 2**

Develop skills and practices that will support customers retention.

**2.1:** Explain and provide examples of customer retention practices for different industries.

**2.2:** Provide examples that demonstrate the concept of 'adding value' to customers.

### **Assessment Criteria**

**2.1:** Appraise CRM (customer relationship management) and customer relationship marketing activities.

**2.2:** Explain and provide examples of customer retention practices for different industries.

**2.3:** Create examples that demonstrate the concept of 'adding value' to customers.

### **Task 3**

Explore and learn from examples of customer centred organisations and the benefits of such an approach.

**3.1:** Research customer-centred organisations across different industries and evaluate the benefits of their approaches.

**3.2:** Based on this research, make recommendations to an organisation (chosen by you) for improving its approach to customers.

### **Assessment Criteria**

**3.1:** Research customer centres organisations across different industries and evaluate their approaches.

**3.2:** Create recommendations for an organisation known by the Leaner for improving its approach to customers.





## **OFFICE**

Unit 03, 17/F, Trendy Centre,  
682 Castle Peak Road,  
Lai Kok Chi, Kowloon, Hong Kong

Email: [admin@pioneeronlineacademy.com](mailto:admin@pioneeronlineacademy.com)