

Qualification specification

**NCFE Level 2 Certificate in Digital Customer
Relationship Management (CRM)
QN: 610/0537/X**

Qualification summary

Qualification title	NCFE Level 2 Certificate in Digital Customer Relationship Management (CRM)		
Ofqual qualification number (QN)	610/0537/X	Aim reference	6100537X
Guided learning hours (GLH)	115	Total qualification time (TQT)	179
Minimum age	16		
Qualification purpose	This qualification is designed for learners who want to increase their knowledge of digital CRM. Successful completion of the required units will allow the learner to develop in-depth knowledge and understanding of digital CRM. It will also support progression into relevant employment and further study.		
Grading	Achieved/not yet achieved		
Assessment method	Internally assessed and externally quality assured portfolio of evidence.		
Work/industry placement experience	This is a knowledge-only qualification. Work/industry placement experience is not required.		

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Section 1: introduction

If you are using this qualification specification for planning purposes, please make sure that you are using the most recent version.

Aims and objectives

This qualification aims to:

- focus on the study of digital customer relationship management (CRM) within the information and communication technology sector

The objective of this qualification is to:

- provide the learner with in-depth knowledge and understanding of digital CRM

Support handbook

This qualification specification must be used alongside the mandatory support handbook on the qualifications page on the NCFE website, which contains additional supporting information to help with planning, delivery and assessment.

This qualification specification contains all of the qualification-specific information you will need that is not covered in the support handbook.

Guidance for entry and registration

This qualification is designed for those who are working or would like to work in a setting that uses digital CRM systems. It is ideal for those who want to consolidate their existing knowledge which can be used to assist in seeking employment or to progress into further study.

It may also be useful to learners studying qualifications in the following sectors/areas:

- data analysis
- business administration
- customer service
- project management
- event planning
- marketing
- sales

Registration is at the discretion of the centre, in accordance with equality legislation and should be made on the Portal.

There are no specific prior skills/knowledge a learner must have for this qualification. However, learners may find it helpful if they have already achieved a level 1 qualification.

Centres are responsible for ensuring that all learners are capable of achieving the learning outcomes and complying with the relevant literacy, numeracy and health and safety requirements.

Learners registered on this qualification should not undertake another qualification at the same level, or with the same/a similar title, as duplication of learning may affect funding eligibility.

Achieving this qualification

To be awarded this qualification, learners are required to successfully achieve **5** mandatory units.

Please refer to the list of units in appendix A or the unit summaries in section 2 for further information.

To achieve this qualification, learners must successfully demonstrate their achievement of all learning outcomes of the units as detailed in this qualification specification. A partial certificate may be requested for learners who do not achieve their full qualification but have achieved at least one whole unit.

Progression

Learners who achieve this qualification could progress to the following:

- employment:
 - sales accounts and business development
 - sales administrator
 - digital marketing executive
 - CRM analyst
- further education:
 - Level 3 Certificate in Data
 - Level 3 Diploma in Skills for Business (Sales and Marketing)
 - Level 3 Certificate in Digital Support
 - Level 3 qualifications in programming and software development

Resource requirements

There are no mandatory resource requirements for this qualification, but centres must ensure learners have access to suitable resources to enable them to cover all the appropriate learning outcomes. For example, centres may consider providing access to a computer laptop/desktop and digital CRM software/applications for demonstration purposes.

Real work environment (RWE) requirement/recommendation

This is a knowledge-only qualification. Experience in the real work environment is not required.

Work/industry placement experience

This is a knowledge-only qualification. Work/industry placement experience is not required.

How the qualification is assessed

Assessment is the process of measuring a learner's skill, knowledge and understanding against the standards set in a qualification.

This qualification is internally assessed and externally quality assured.

The assessment consists of 1 component:

- an internally assessed portfolio of evidence which is assessed by centre staff and externally quality assured by NCFE (internal quality assurance (IQA) must still be completed by the centre as usual)

Learners must be successful in this component to gain the Level 2 Certificate in Digital Customer Relationship Management (CRM).

All the evidence generated by the learner will be assessed against the standards expected of a level 2 learner for each learning outcome.

Unless otherwise stated in this specification, all learners taking this qualification must be assessed in English and all assessment evidence presented for external quality assurance must be in English.

Internal assessment

Each learner must create a portfolio of evidence generated from appropriate assessment tasks, which demonstrates achievement of all the learning outcomes associated with each unit. On completion of each unit, learners must declare that the work produced is their own and the assessor must countersign this. Examples of suitable evidence for the portfolio for each unit are provided in section 2.

A centre may choose to create their own internal assessment tasks. There are 4 essential elements in the production of successful centre-based assessment tasks.

These are:

- ensuring the assessment tasks are meaningful with clear, assessable outcomes
- appropriate coverage of the content, learning outcomes, or assessment criteria
- having a valid and engaging context or scenario
- including sufficient opportunities for stretch and challenge for higher attainers

Please see the guidance document for creation of internal assessment tasks on our website.

Assessment guidance is provided for each unit. Assessors can use other methods of assessment as long as they are valid and reliable and maintain the integrity of the assessment and of the standards required of this qualification.

Section 2: unit content and assessment guidance

This section provides details of the structure and content of this qualification.

The types of evidence listed are for guidance purposes only. Within learners' portfolios, other types of evidence are acceptable if all learning outcomes are covered and if the evidence generated can be internally and externally quality assured. For approval of methods of internal assessment other than portfolio building, please contact your external quality assurer.

The explanation of terms explains how the terms used in the unit content are applied to this qualification. This document can be found in section 3.

Unit 01 Introduction to digital customer relationship management (CRM) (H/650/1502)



Unit summary			
In this unit, learners will know about customer relationships and their importance. They will also understand the role of digital customer relationship management (CRM) and its users.			
Assessment			
This unit is internally assessed via a portfolio of evidence.			
Mandatory	Achieved/not yet achieved	Level 2	20 GLH

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Know about customer relationships	1.1 Define what is meant by customer relationships
	1.2 Explain the importance of customer relationships
	1.3 Explain the difference between customers and consumers
	1.4 Explain the importance of identifying your customers
	1.5 Explain what is meant by direct marketing
	1.6 Describe types of direct marketing
2. Understand the concept of digital CRM	2.1 Explain what is meant by digital CRM
	2.2 Explain the differences between digital and non-digital CRM
	2.3 Explain what is meant by: <ul style="list-style-type: none"> operational CRM analytical CRM collaborative CRM
	2.4 Define the following terms in the context of digital CRM: <ul style="list-style-type: none"> transactional approach relational approach proactive and reactive approaches
3. Understand the role of digital CRM	3.1 Explain the potential uses of a digital CRM system
	3.2 Identify the benefits of using digital CRM to: <ul style="list-style-type: none"> an organisation a customer
	3.3 Explain how a digital CRM system is used in an organisation
	3.4 Identify areas of digital CRM focus
	3.5 Identify how different teams within an organisation might use digital CRM
	3.6 Explain how digital CRM can be used as a strategic marketing tool
4. Know about the features of digital CRM	4.1 Identify features of a digital CRM system
	4.2 Explain the purpose of a digital CRM dashboard
	4.3 Identify the benefits of using a dashboard
	4.4 Explain how a dashboard could be used to inform business decisions
5. Understand the roles of digital CRM users	5.1 Explain the importance of providing permissions to users to access restricted areas of digital CRM
	5.2 Give reasons as to why user access to digital CRM can be terminated
	5.3 Explain the importance of having a secured digital CRM system
	5.4 Explain the role of a system administrator in monitoring the use of digital CRM
	5.5 Explain the importance of appropriate training for digital CRM
	5.6 Identify the role and responsibilities of the CRM manager in CRM planning and implementation

Range
<p>1. Know about customer relationships</p> <p>1.2 Customer relationships:</p> <ul style="list-style-type: none"> • developing relationships • customer engagement: <ul style="list-style-type: none"> ○ proactive ○ reactive • build customer base • retention <p>1.3</p> <ul style="list-style-type: none"> • customers: <ul style="list-style-type: none"> ○ purchase the product/service ○ could consume or resell • consumers: <ul style="list-style-type: none"> ○ the end user ○ usually buy from a service or product producing business ○ cannot resell <p>Businesses have direct contact with customers and build relationships. Customer details are often retained; consumers' details are not.</p> <p>1.4 Identifying your customers:</p> <ul style="list-style-type: none"> • meet customer requirements by providing appropriate products/services • retention • increase business opportunities: <ul style="list-style-type: none"> ○ look at current customer base to identify an ideal customer profile ○ identify customer needs, wants, fears and goals ○ identify customer habits ○ identify how a customer makes their decisions <p>1.5 Direct marketing:</p> <p>Communicating or distributing to the customer directly (no intermediaries).</p>

Range
<p>1.6 Types:</p> <p>Learners must describe a minimum of 3 types of direct marketing:</p> <ul style="list-style-type: none"> • email • web marketing • direct mail • social media • telemarketing • mass media
<p>2. Understand the concept of digital CRM</p>
<p>2.2 Digital and non-digital CRM:</p> <ul style="list-style-type: none"> • automated/manual • cost • efficiency • accuracy • resource requirements <p>2.3</p> <ul style="list-style-type: none"> • operational CRM: <ul style="list-style-type: none"> ○ sales ○ marketing ○ service ○ centralised ○ automation • analytical CRM: <ul style="list-style-type: none"> ○ data gathered from current customer base ○ analyses trends ○ forecasts demand ○ allows targeted marketing ○ data gathered can be used to inform business decisions • collaborative CRM: <ul style="list-style-type: none"> ○ interactions across departments, teams, and external partners ○ integration with other applications ○ feeds to social media ○ interaction management ○ channel management ○ cross-team collaboration ○ working together to achieve business goals

Range
3. Understand the role of digital CRM
3.1 Potential uses: <ul style="list-style-type: none"> • sales • service • financial • customer information • customer interactions • manage customer engagement • online behaviour analysis • online trend analysis
3.2 <ul style="list-style-type: none"> • organisation: <ul style="list-style-type: none"> ○ better understanding of their customers and potential customers ○ maintain customer base/customer retention ○ credibility with customer ○ gain trust and loyalty ○ standardised communications ○ automated workflow to increase processing speed and reduce manual errors • customer: <ul style="list-style-type: none"> ○ well-informed and given accurate information ○ interactions are streamlined and relevant ○ confidence in the brand ○ feel valued
3.3 How a digital CRM system is used: <ul style="list-style-type: none"> • direct contacts • indirect contacts • trend and purchasing analysis • cross-selling • acting on information
3.4 CRM focus: <ul style="list-style-type: none"> • identifying customers and customer segmentation • building relationships • introduce and sell new products and/or services • increase revenue • reduce costs • expand customer base • customer retention • more effective communications • better protection of customer data

Range
3.6 Strategic marketing tool: <ul style="list-style-type: none"> identifying customer interests, behaviour and trends, enabling a business to provide a personalised customer experience automate and streamline processes anticipation of customer requirements and cross-selling
4. Know about the features of digital CRM
4.1 Features: <ul style="list-style-type: none"> data warehouse workflow automation contact management dashboards and reporting customisation third-party integration lead management/sales pipeline analytics management information (MI)/reporting email integration 4.3 Benefits: <p>Learners must identify 3 benefits of using a dashboard:</p> <ul style="list-style-type: none"> updates in real time quick glance summary of information, such as: <ul style="list-style-type: none"> sales: <ul style="list-style-type: none"> leads interactions goals/targets/conversion rates can be customised task tracking 4.4 Inform business decisions: <p>Business decisions could be made based on:</p> <ul style="list-style-type: none"> service levels going up/down issues/training needs identified improvements to processes are identified current customer activity could inform future marketing

Range
<p>5. Understand the roles of digital CRM users</p> <p>5.1 Permissions must include role-based access control (RBAC) to ensure permissions are linked to job role.</p> <p>5.2 Terminated:</p> <ul style="list-style-type: none"> • ex-employee may perform a malicious attack • access should be linked to a company login which should be disabled once an employee leaves/has their employment terminated • if an employee has been the subject of a malicious attack <p>5.4 System administrator:</p> <ul style="list-style-type: none"> • monitoring • identifying changes being made • identifying issues • adding/removing/changing user access • ensuring system is updated in line with maintenance and vulnerability management policies <p>5.5 Appropriate training:</p> <ul style="list-style-type: none"> • to maximise the use of digital CRM and increase productivity • ensuring sensitive data is handled appropriately • ensuring employees are made aware of their responsibilities <p>5.6 CRM manager:</p> <ul style="list-style-type: none"> • to support the CRM strategy • training • making improvements • reporting to senior managers • responding to faults that have been reported • developing CRM programmes • gathering feedback regarding CRM • customer interaction • ensuring system updates are made • ensuring security patching is done in line with vulnerability management policy
Delivery and assessment guidance
<p>2.2 The tutor could ask the learners to look at their own workplace or provide them with a case study. Learners can look at whether a digital or non-digital CRM system is used and explain how the 2 differ.</p> <p>3.3 Learners could explain how different teams within their own organisation might use a digital CRM system or the tutor could provide a case study, if the learner is not in employment.</p>

Unit 02 Understanding customer management (J/650/1503)



Unit summary			
In this unit, the learner will understand customers and contact management using digital CRM. They will know about customer retention and the importance of developing customer relationships			
Assessment			
This unit is internally assessed via a portfolio of evidence.			
Mandatory	Achieved/not yet achieved	Level 2	20 GLH

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the customer	1.1 Explain what is meant by a customer database
	1.2 Give examples of the benefits of having a customer database
	1.3 Explain what is meant by: <ul style="list-style-type: none"> customer behaviour customer profile analysis customer segmentation
	1.4 Explain the term customer lifetime value (CLV)
	1.5 Identify factors that influence customer behaviour
	1.6 Identify benefits of customer segmentation
2. Understand the need for customer relationships	2.1 Describe the importance of developing relationships with customers
	2.2 Explain the value of customer loyalty
	2.3 Explain how customers' expectations may change over time
	2.4 State factors that help develop customer profitability
3. Understand contact management using digital CRM	3.1 Explain what is meant by contact management
	3.2 Identify ways of interacting with customers
	3.3 Identify types of interactions that may be tracked in a contact management system
	3.4 Explain how interactions are recorded in a contact management system
	3.5 Explain the requirements, advantages and disadvantages of different contact management tracking systems
	3.6 Explain how contact management might be used by teams across a business, including: <ul style="list-style-type: none"> sales marketing business intelligence customer support finance
4. Know about customer retention	4.1 Explain the term customer retention
	4.2 State the benefits of customer retention to an organisation
	4.3 Explain the factors that influence customer: <ul style="list-style-type: none"> retention recovery
	4.4 Explain the role that digital CRM plays in customer retention
	4.5 Define what is meant by: <ul style="list-style-type: none"> customer defection rate customer attrition

Learning outcomes The learner will:	Assessment criteria The learner can:
	4.6 Explain the importance of customer interaction management
	4.7 Identify strategies of customer acquisition
5. Understand the use of feedback for developing customer relationships	5.1 Identify a range of techniques used to measure customer satisfaction
	5.2 Explain how customer feedback can be used to develop customer relationships

Range
1. Understand the customer
1.1 Customer database: Stores customer specific information, which could include: <ul style="list-style-type: none"> • name • address • contact details • email address • preferences • sales history 1.3 Customer segmentation: Segmenting is the technique used to enable a business to better target its products at the right customers.
2. Understand the need for customer relationships
2.3 Customers' expectations: What customers think should happen and how they think they should be treated when asking for or receiving customer service. Customers may have expectations around: <ul style="list-style-type: none"> • the protection of their data and how it is stored by a company • communication methods and how they are contacted
3. Understand contact management using digital CRM
3.2 Ways of interacting: <ul style="list-style-type: none"> • email (could be automated) • phone calls • webchat • invoicing • social media • text/video messaging • satisfaction survey

Range
3.6 <ul style="list-style-type: none"> • sales: <ul style="list-style-type: none"> ○ data management ○ prospects and lead generation ○ reporting • marketing: <ul style="list-style-type: none"> ○ marketing automation ○ reporting ○ campaign creation ○ link marketing materials automatically • business intelligence: <ul style="list-style-type: none"> ○ gathering insight ○ trend analysis ○ forecasting ○ reporting • customer support: <ul style="list-style-type: none"> ○ reporting ○ case creation ○ workflow automation ○ service level agreements (SLAs) linked to resolution time • finance: <ul style="list-style-type: none"> ○ manage revenue ○ workflow automation ○ reporting
4. Know about customer retention
4.7 Customer acquisition: <ul style="list-style-type: none"> • prioritising customers • lead generation • incentivising new and existing customers • interactions • cross-selling

Delivery and assessment guidance

3.4 Learners must explain how interactions are recorded in a contact management system in line with organisational standards and procedures.

Unit 03 Understanding data management in digital customer relationship management (CRM) (K/650/1504)



Unit summary			
In this unit, learners will understand the importance of maintaining current and accurate data within a digital CRM system. They will understand current data protection legislation and the importance of having a secured provider and network to access digital CRM. Learners will also know how to troubleshoot and respond to common IT system problems and errors.			
Assessment			
This unit is internally assessed via a portfolio of evidence.			
Mandatory	Achieved/not yet achieved	Level 2	25 GLH

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand why it is important to maintain accurate and current data in digital CRM	1.1 List types of data stored in a digital CRM system
	1.2 Explain the importance of keeping customer records accurate and up to date
	1.3 Identify ways to ensure customer records are accurate and up to date
	1.4 Identify possible consequences of inaccurate record keeping
	1.5 Describe how digital CRM systems can help a business identify and verify customer details
	1.6 Explain the benefits of automation within digital CRM
2. Understand the use of secured digital CRM	2.1 Explain the importance of having a secured and trusted digital CRM provider
	2.2 State reasons for using strong usernames and passwords to access digital CRM
	2.3 Identify the importance of using a secured network to access digital CRM
	2.4 Give examples of security concerns that should be reported
	2.5 State why security policies must be updated in line with updates to the digital CRM system
3. Know how to troubleshoot and respond to common IT system problems and errors	3.1 Explain the term troubleshooting in the context of digital CRM
	3.2 Describe common system problems and what causes them
	3.3 Give example of when to try to solve an IT system problem independently, and when to get expert advice
4. Understand current data protection legislation	4.1 Define what is meant by personal data
	4.2 Describe the purpose of data protection requirements
	4.3 Explain what is meant by a lawful basis for processing personal data
	4.4 Explain what is meant by ethical use of data
	4.5 State the role that a database management system plays in securing data

Range
<p>1. Understand why it is important to maintain accurate and current data in digital CRM</p> <p>1.5 Identify and verify customer details with the use of reliable data or information.</p> <p>1.6 Benefits of automation:</p> <ul style="list-style-type: none"> • manual methods are open to error • increase productivity • reduce costs • streamline processes • improve customer service and customer relationship
<p>2. Understand the use of secured digital CRM</p> <p>2.3 Secured network:</p> <ul style="list-style-type: none"> • to reduce risk of attacks • a virtual private network (VPN) service would provide a secure connection • can be protected with two-factor authentication
<p>3. Know how to troubleshoot and respond to common IT system problems and errors</p> <p>3.1 Troubleshooting:</p> <ul style="list-style-type: none"> • problem solving • identifying an issue • root cause analysis <p>Resolve or report based on training provided and in line with company policy.</p> <p>3.2 Common system problems:</p> <ul style="list-style-type: none"> • network issues • access issues • viruses • updates required • cyber threats <p>3.3 Expert advice:</p> <p>Before seeking expert advice, a person could:</p> <ul style="list-style-type: none"> • restart the computer • check internet connection • run updates • check all cabling • run a virus scan if permissions allow <p>They should contact an expert if:</p> <ul style="list-style-type: none"> • there is a system/network error • they are concerned that they have been hacked

Range
4. Understand current data protection legislation
4.2 Data protection to include the Data Protection Act 2018, which was brought in to make UK General Data Protection Regulation (UK GDPR) legally enforceable in the UK, for example.
4.5 Database management system: <ul style="list-style-type: none">• manages how the data is organised• data is stored in tables• better data integration• prevents unauthorised access• ability to mine data• provides role-based access control (RBAC) which is also important to data protection compliance
Delivery and assessment guidance
4.1–4.4 It is important that learners focus on the latest version of regulations/legislation/acts to give the qualification currency.
4.2 Learners must show an awareness of the Information Commissioner's Office (ICO) and its role in relation to UK GDPR.
When discussing UK GDPR, learners must consider the requirements of businesses to employ a data protection officer and the basic duties of this job role.
Learners may also identify the key principles of the Computer Misuse Act (1990).

Unit 04 Understanding digital customer relationship management (CRM) products and integration (L/650/1505)



Unit summary			
In this unit, learners will know about different digital CRM products. They will know about data mining and data warehousing and will understand the benefits of integrating digital CRM with other systems.			
Assessment			
This unit is internally assessed via a portfolio of evidence.			
Mandatory	Achieved/not yet achieved	Level 2	25 GLH

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand digital CRM products	1.1 Identify steps involved in: <ul style="list-style-type: none"> operational CRM analytical CRM
	1.2 Compare operational and analytical CRM
	1.3 Compare different digital CRM products
2. Know about data mining and data warehousing	2.1 Explain what is meant by a data warehouse
	2.2 Identify advantages and disadvantages of data warehousing
	2.3 Explain the purpose of data mining
3. Understand the benefits of integrating digital CRM systems	3.1 Explain the benefits of integrating digital CRM with other systems
	3.2 State factors to be considered when integrating digital CRM with other systems
	3.3 Explain the differences between systems, applications and products (SAP) and enterprise resource planning (ERP)
	3.4 Explain the benefits of integrating a customer analytics system

Range
1. Understand digital CRM products
1.1 <ul style="list-style-type: none"> • operational CRM – used to integrate and automate workflows in: <ul style="list-style-type: none"> ○ customer service ○ marketing ○ sales <p>Learners will identify steps involved in an operational process that takes place within their own organisation or for a given scenario.</p> <ul style="list-style-type: none"> • analytical CRM: <ul style="list-style-type: none"> ○ trend analysis ○ behavioural analysis ○ allows market segregation and associated sales targeting ○ customer retention ○ financial analysis ○ information informs future decision making <p>1.3 Digital CRM products:</p> <p>Learners must compare at least 3 digital CRM products.</p>
2. Know about data mining and data warehousing
2.1 Data warehouse: <p>Data is pulled from multiple sources into one area, enabling the organisation to analyse it. The information can be used to inform decision making.</p> <p>2.2 Advantages and disadvantages:</p> <p>Learners must identify at least 3 advantages and 3 disadvantages.</p> <p>Advantages could include:</p> <ul style="list-style-type: none"> • increases efficiency as data is there to analyse rather than having to be gathered first • helps inform decision making • enables historical data to be gathered • deduplication increases data quality • introduces scalability • increases data security • faster processing of data • competitive advantage

Range

Disadvantages could include:

- high volume of data
- relies on data being up to date
- maintenance required
- skilled staff required
- cost:
 - expensive staff skillset
 - maintenance
- time consuming to create and manage
- data protection requirements may limit some uses

2.3 Data mining:

- identifying patterns and trends in large amounts of data
- searching the relationship between valuables/customers
- retrieving the data from the data warehouse
- detecting data anomalies
- clustering to discover similar data
- summarising data

3. Understand the benefits of integrating digital CRM systems**3.1 Benefits:**

Learners could explain the benefits of integrating the following features:

- marketing automation
- workflow automation
- data management/reporting features
- customer interaction and tracking
- communications:
 - chat
 - templates
 - email
 - call handling

3.1 Other systems could include but are not limited to:

- systems, applications and products (SAP)
- enterprise resource planning (ERP)

3.2 Factors to be considered must include as a minimum:

- compatibility issues
- the environment in which the system will operate
- cost
- requirements and whether the system is fit for purpose
- is there a better integrated solution that can reduce cost/maintenance?

Range**3.4 Customer analytics system:**

- analyses customer behaviours
- once integrated with CRM, it can use that data to help understand the effectiveness of processes
- use the data to inform decisions
- automation
- metrics tracking/key performance indicators (KPIs)

Delivery and assessment guidance

No specific assessment guidance for this unit.

Unit 05 Introduction to digital customer relationship management (CRM) data reports (M/650/1506)


Unit summary			
In this unit, learners will know how to create, edit and run data queries and produce reports using business intelligence software.			
Assessment			
This unit is internally assessed via a portfolio of evidence.			
Mandatory	Achieved/not yet achieved	Level 2	25 GLH

Learning outcomes	Assessment criteria
The learner will:	The learner can:
1. Know how to create, edit and run data queries and produce reports using business intelligence software	1.1 Explain what is meant by a relational database
	1.2 Identify the characteristics of data management for digital CRM
	1.3 Explain how queries generate data from the database
	1.4 Explain how a query is created
	1.5 Explain the structure of a query
	1.6 Identify steps involved in executing a query
	1.7 Explain how to plan and produce database reports from a multiple-table relational database
	1.8 Identify appropriate tools and techniques to format database reports
	1.9 Explain how to check data meets requirements

Range
<p>1. Know how to create, edit and run data queries and produce reports using business intelligence software</p> <p>1.2 Characteristics of data management:</p> <ul style="list-style-type: none"> • supports atomicity, consistency, isolation and durability (ACID) properties • secured features • data is within unique tables • data cleansing • error correction • deduplication • can be securely accessed remotely • access can be limited to job role • data can be safeguarded with encryption • audit logging/analysis to prevent misuse <p>1.4 How a query is created:</p> <ul style="list-style-type: none"> • using a query language (for example, SQL) • tables are joined in a query using primary and foreign keys to link data in the tables • forms and database views are created <p>1.5 Structure of a query must include:</p> <ul style="list-style-type: none"> • always starts with a statement such as: <ul style="list-style-type: none"> ○ SELECT ○ FROM ○ WHERE <p>Could include:</p> <ul style="list-style-type: none"> • features: <ul style="list-style-type: none"> ○ INSERT ○ UPDATE ○ ORDER BY <p>1.8 Tools and techniques:</p> <ul style="list-style-type: none"> • data fields • page and section layout • add text or images • styles • filters
Delivery and assessment guidance
<p>1. The learners could use a data query typical of their own workplace or learning environment or can be provided with an example data query if not in employment.</p>

Assessment strategies and principles relevant to this qualification

The units we offer have been developed in line with the specific assessment strategies or principles of different Sector Skills Councils (SSCs) or by us where there is no SSC lead.

The key requirements of the assessment strategies or principles that relate to units in this qualification are summarised below.

The centre needs to ensure that individuals undertaking assessor or quality assurer roles within the centre conform to the SSC or our assessment requirements for the unit they are assessing or quality assuring.

Assessment strategy

Knowledge learning outcomes:

- assessors will need to be both occupationally knowledgeable and qualified to make assessment decisions
- internal quality assurers will need to be both occupationally knowledgeable and qualified to make quality assurance decisions

Competence/skills learning outcomes:

- assessors will need to be both occupationally competent and qualified to make assessment decisions
- internal quality assurers will need to be both occupationally knowledgeable and qualified to make quality assurance decisions

Section 3: explanation of terms

This table explains how the terms used at level 2 in the unit content are applied to this qualification (not all verbs are used in this qualification).

Apply	Link existing knowledge to new or different situations.
Assess	Consider information in order to make decisions.
Classify	Organise according to specific criteria.
Compare	Examine the subjects in detail looking at similarities and differences.
Define	State the meaning of a word or phrase.
Demonstrate	Show an understanding of the subject or how to apply skills in a practical situation.
Describe	Write about the subject giving detailed information.
Differentiate	Give the differences between 2 or more things.
Discuss	Write an account giving more than one view or opinion.
Distinguish	Show or recognise the difference between items/ideas/information.
Estimate	Give an approximate decision or opinion using previous knowledge.
Explain	Provide details about the subject with reasons showing how or why. Some responses could include examples.
Give (positive and negative points...)	Provide information showing the advantages and disadvantages of the subject.
Identify	List or name the main points (some description may also be necessary to gain higher marks when using compensatory marking).
Illustrate	Give clear information using written examples, pictures or diagrams.

List	Make a list of key words, sentences or comments that focus on the subject.
Perform	Do something (take an action/follow an instruction) that the question or task asks or requires.
Plan	Think about and organise information in a logical way. This could be presented as written information, a diagram, an illustration or other suitable format.
Provide	Give relevant information about a subject.
Reflect	Learners should look back on their actions, experiences or learning and think about how this could inform their future practice.
Select	Choose for a specific purpose.
Show	Supply sufficient evidence to demonstrate knowledge and understanding.
State	Give the main points clearly in sentences.
Use	Take or apply an item, resource or piece of information as asked in the question or task.

Section 4: support

Support materials

The following support materials are available to assist with the delivery of this qualification and are available on the NCFE website:

- learner's evidence tracking log (LETL)
- learning resources
- qualification factsheet

Other support materials

The resources and materials used in the delivery of this qualification must be age-appropriate and due consideration should be given to the wellbeing and safeguarding of learners in line with your institute's safeguarding policy when developing or selecting delivery materials.

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Appendix A


Units

To make cross-referencing assessment and quality assurance easier, we have used a sequential numbering system in this document for each unit.

 Knowledge only units are indicated by a star. If a unit is not marked with a star, it is a skills unit or contains a mix of knowledge and skills.

Mandatory units

	Unit number	Regulated unit number	Unit title	Level	GLH
	Unit 01	H/650/1502	Introduction to digital customer relationship management (CRM)	2	20
	Unit 02	J/650/1503	Understanding customer management	2	20
	Unit 03	K/650/1504	Understanding data management in digital customer relationship management (CRM)	2	25
	Unit 04	L/650/1505	Understanding digital customer relationship management (CRM) products and integration	2	25



Unit number	Regulated unit number	Unit title	Level	GLH
Unit 05	M/650/1506	Introduction to digital customer relationship management (CRM) data reports	2	25

The units above may be available as stand-alone unit programmes. Please visit our website for further information.