



ASIAN PRODUCTIVITY ORGANIZATION

PROJECT NOTIFICATION

3 March 2016

- 1. Project Code** 16-IN-70-GE-WSP-B
- 2. Title** Workshop on Customer Relationship Management (CRM) for SMEs
- 3. Timing and Duration** 5–9 September 2016 (five days)
- 4. Venue** Taipei, Republic of China
- 5. Implementing Organization** China Productivity Center (CPC)
Address: 2F, No. 79, Sec. 1, Xintai 5th Rd. Xizhi Dist.
New Taipei City 221, Republic of China
Phone: 886-2-2698-2989
Fax: 886-2-2698-2976
e-Mail: 2844@cpc.org.tw
- 6. Number of Overseas Participants** Up to 18 qualified participants from Bangladesh, Cambodia, Fiji, India, Indonesia, IR Iran, Lao PDR, Malaysia, Mongolia, Nepal, Pakistan, Philippines, Sri Lanka, Thailand and Vietnam. However, other member countries with special interest in this project may nominate candidates upon consultation with the APO Secretariat.
- 7. Number of Local Participants** Up to six qualified participants
- 8. Closing Date for Nominations** 1 July 2016
- 9. Objectives**
 - a. To discuss key concepts and priorities of customer relationship management (CRM) for SMEs and develop approaches and methodologies to manage their performance;
 - b. To examine the strategic use of performance measures and how to establish indicators, specific targets, and goals for improving overall performance in SMEs; and
 - c. To provide tools and techniques to manage customer relations strategically.

10. Background

CRM is the practice of integrating all aspects of business functions for dealing with customers with the assistance of technology and with the intention of boosting company profitability. CRM has been widely promoted as a critical contributor to business survival. CRM, however, is not simply a technology but rather a comprehensive, customer-focused approach to an organization's philosophy on dealing with its customers. This includes policies and processes, customer service, employee training, marketing, and information management systems. Hence, it is important for CRM implementation to expand beyond technology toward broader organizational requirements.

To create and maintain customer loyalty, many companies are attempting to reorganize their business processes around customers. In this context, information systems offer a strategic advantage in improving relationships with the desired customer segments, and CRM software packages have become popular tools.

This workshop aims to enable participants from SMEs to understand the key points and priorities to be tackled in managing customer information strategically and how SMEs can manage customer satisfaction for their benefit.

11. Scope and Methodology

Scope

Concept of CRM, CRM technology and solutions, customer data analysis for CRM, and best practices of CRM.

Methodology

Lectures, site visits, country presentations, and group discussions and presentations.

The tentative program of the workshop is given below:

Date/Time	Activity
Sun., 4 September 2016	Arrival of participants in Taipei
Mon., 5 September 2016	Opening session, workshop overview, resource speakers' presentations
Tues., 6 September 2016	Presentations on CRM by resource speakers and country paper presentations
Wed., 7 September 2016	Observational site visits
Thurs., 8 September 2016	Group discussion and action plan preparation
Fri., 9 September 2016	Group presentations, summing-up session, and closing ceremony
Sat., 10 September 2016	Departure of participants

12. Qualifications of Candidates

The participants are expected to possess the following qualifications:

Present Position	Executive directors, senior planning and marketing managers of SMEs, or NPO consultants involved in supporting and training SMEs.
Experience	At least three years of experience in the position described above.
Education	University degree or equivalent qualification from a recognized university/institution.
Language	All proceedings of the project are conducted in English, and participants are frequently required to make oral and written presentations. They must therefore be proficient in spoken and written English. Those who are not proficient in English will not be accepted.
Health	Physically and mentally fit to attend an intensive project requiring participants to complete a number of individual and group activities and strenuous fieldwork. It is therefore

recommended that member countries not nominate candidates likely to suffer from physical and mental stress.

Age Candidates who fit the above profile are typically between 27 and 50 years of age.

APO Certificate Participants are required to attend the entire program to receive the APO certificate of attendance.

13. Financial Arrangements

To be borne by participants or participating countries

- a. Participants' insurance premiums: All participants should be fully insured against accident and illness (including hospitalization and death) for a principal sum equivalent to US\$10,000.00 for the entire duration of the project and travel and must submit to the APO Secretariat a copy of the comprehensive travel insurance certificate before participation. Such insurance should be valid in the host country. This insurance requirement is in addition to existing government insurance coverage in some member countries. If any participant is unable to insure himself/herself as stipulated above, he/she should secure this insurance in the host country at the commencement of the project and pay the premium himself/herself, if necessary, from the per diem allowance provided. Neither the APO nor the implementing organizations will be responsible for any eventuality arising from accident or illness.
- b. All expenses related to visa fees and airport taxes.
- c. Any expenses incurred by participants for stopovers on the way to and from the project venue as well as for extra stay at the project venue before and/or after the official project period because of early arrival or late departure, for example, due to either limited available flights or any other reason.

To be borne by the host country

- a. Per diem allowances and hotel accommodation for up to 18 overseas participants for up to six days at the rate to be specified later.
- b. All local implementation costs.

To be borne by the APO

- a. All assignment costs of overseas resource persons.
- b. Round-trip economy-class international airfare by the most direct route between the international airport nearest to the participants' place of work and Taipei. As far as practicable, all participants should purchase discount tickets. Please note that the arrangements for the purchase of air tickets should follow the "Guide on Purchases of Air Tickets for APO Participants," which will be sent to the selected participants. It is also available on the APO website and from APO Liaison Officers in member countries.

14. Actions by Member Countries

- a. Each participating country is requested to nominate three or more candidates in the order of preference. Please ensure that candidates nominated meet the qualifications specified under section 12 above.

- b. No form of self-nomination will be accepted. All nominations must be endorsed and submitted by an APO Director, Alternative Director, Liaison Officer, or their designated officer.
- c. Please note that nomination of a candidate does not necessarily guarantee that he/she will be selected. Selection is at the discretion of the APO Secretariat. A basic criterion for selection is the homogeneity of the participants in terms of qualifications and work experience. Nonselection therefore does not mean that the candidates concerned are not competent enough. Sometimes candidates are not selected because they are overqualified for a project.
- d. Each nomination should be accompanied by the necessary documents. A nomination lacking any of these documents may not be considered: two copies of the candidate's biodata on the APO biodata form together with a passport-sized photograph. The biodata form can be downloaded from the APO website (www.apo-tokyo.org). We encourage submitting the biodata form to the APO Secretariat in electronic form as an attachment to a cover e-mail message from the APO Director, Alternate Director, or Liaison Officer. The nomination documents should be sent to the Industry Department, APO Secretariat.
- e. The APO Medical and Insurance Declaration/Certification Form. Every candidate must complete and submit a copy of the APO Medical and Insurance Declaration/Certification Form with his/her biodata at the time of nomination. Please note that self-declaration is sufficient for candidates without any of health conditions or illnesses listed on the reverse side of the medical form. However, for all others, medical certification by a licensed physician on the reverse side of the medical form is required.
- f. Necessary documents are to be submitted electronically. In that case, there is no need to send a hard copy by postal mail. However, if the documents are submitted by fax, member countries are requested to mail the originals of the documents to the APO Secretariat as well. If a digital photograph of a nominee is not attached to the electronic biodata form, a hard-copy photograph should be sent to the APO Secretariat by postal mail. Please give the candidate's name and the project code on the reverse side of the photograph.
- g. Member countries are requested to adhere to the nomination deadline given on page 1. The APO Secretariat may not consider late nominations as they have in the past resulted in considerable difficulties to the implementing organization in its preparatory work for the project.
- h. For member countries where nominations are required to be approved by higher government authorities and require a longer time, the APO Liaison Officers/NPOs are urged to send the names of nominees on or before the deadline, indicating that government approval will follow.
- i. If a selected participant becomes unable to attend, he/she should inform the APO Liaison Officer/NPO in his/her country immediately and give the reason for withdrawal. The NPO concerned is requested to transmit that information to the APO Secretariat and the host country promptly.
- j. NPOs are requested to inform the selected participants that they are not to bring family members or to engage in any private business activities during the entire duration of the project.
- k. Each selected participant should be instructed to arrive at the venue one day before the start of the official project. Also, he/she is expected to return home upon completion of the official project because he/she is visiting the host country for the specific purpose of attending this APO workshop.

1. NPOs should inform participants that they must attend all five days of the project to qualify for the certificate of attendance.

15. Actions by the APO Secretariat

- a. Under normal circumstances, candidates who are selected will be informed of their acceptance at least four weeks prior to the start of the project.
- b. If some candidates fail to qualify or be unable to participate after selection, or if some member countries fail to nominate any candidate, their slots may be filled by alternates from the same or another member country on a merit basis.

16. Project Preparation

The participants are required to prepare a paper prior to departure for the project venue. In preparing the paper, they are expected to follow the “Guidelines for the Preparation of Country Papers” to be provided later.

17. Postproject Actions

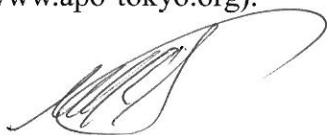
All participants are required to prepare action plans and share the plans with their NPOs. The APO will also request participants to submit progress reports six months after completion of the workshop.

18. Evaluation of Participants

If the conduct/attendance/performance of a participant is not satisfactory, these will be reported to the APO director concerned.

19. Guide for Participants

Other conditions for participation are given in the *APO Guide for Participants*, which is available from APO Liaison Officers/NPOs in member countries and on the APO website (www.apo-tokyo.org).



Mari Amano
Secretary-General