

Specification of Competency Standards for the Retail Banking

Unit of Competency

Retail Banking Service Delivery > 1.1 Delivery of Branch and Account Services

Title	Arrange products and services promotion in branch
Code	107294L4
Range	Arrange promotional activities in branch. This applies to different kinds of promotional activities within a branch context and different kinds of products and services.
Level	4
Credit	3
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Identify suitable kinds of promotional activities <p>Be able to:</p> <ul style="list-style-type: none"> • Understand the types of products and services offered by the branch in order to facilitate and arrange the promotion • Understand the sales plan of the branch, including the objectives, targets, resources and major approaches, etc. in order to arrange suitable promotional activities • Understand the characteristics of different promotional methods in order to identify suitable activities for the sales plan of the branch 2. Coordinate products and services promotion activities in branches <p>Be able to:</p> <ul style="list-style-type: none"> • Liaise with product development teams and sales teams to identify suitable promotional activities carried out in the branch • Prepare the activity plan and ensure adequate and appropriate promotional materials are displayed and distributed • Monitor the operation of promotional activities; identify potential problems and carry out remedial actions when necessary • Prepare reference information to instruct branch personnel to introduce the needs matching features of the promoted items of products and services to customers 3. Monitor sales ethics in branches <p>Be able to:</p> <ul style="list-style-type: none"> • Ensure branch personnel provides accurate products information to customers • Monitor ethical standards of branch personnel and ensure needs matching products or services are recommended to customers
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Conducting promotional activities in branch and providing suitable resources to facilitate the activity. Moreover, suitable remedial actions are executed to ensure a smooth operation when necessary • Ensure accurate and adequate information are provided to customers during the promotion
Remark	