

Specification of Competency Standards for the Retail Banking

Unit of Competency

Sales and Relationship Management > 8.2 Product and Service Selling

Title	Organise, review and analyse customer data to identify sales lead
Code	107523L4
Range	Organise, review and analyse record of all existing and potential customers possessed by individual sales team. This covers information related to sales and marketing activities such as contact details, transaction history and service record
Level	4
Credit	3
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Understand guidelines in organizing and reviewing customer data <p>Be able to:</p> <ul style="list-style-type: none"> • Understand the bank's guidelines in organizing and reviewing customer data in order to handle the job independently • Understand the bank's guidelines in identifying sales leads in order to execute the task independently 2. Organise customer information <p>Be able to:</p> <ul style="list-style-type: none"> • Organise existing account information and intelligence from different sources to identify prospects for sales call • Find new business contacts by leveraging existing customer contacts • Record customer inquiries or information obtained through different contact means in order to gather more information about each particular customer • Record customer intelligence of different varieties into database to compile a comprehensive profile for each customer 3. Review customer database to locate sales leads <p>Be able to:</p> <ul style="list-style-type: none"> • Qualify customer leads by applying the well defined standards adopted by the bank • Compile a list of customer leads which include key information related to the customers 4. Protect customer data in a professional manner <p>Be able to:</p> <ul style="list-style-type: none"> • Comply to the privacy ordinance and the bank's internal standard when handling different sources of customer information • Prevent leakage of customer data throughout the whole process of recording, storing and retrieving • Respect customers' privacy and take all necessary actions to safeguard their personal and account information
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • A list of potential customers for conducting sales calls. The list should contain accurate contact details of individual prospect • Organizing and reviewing customer's data independently by following the bank's guidelines and compliance requirements
Remark	