

Specification of Competency Standards for the Retail Banking

Unit of Competency

Sales and Relationship Management > 8.3 Sales Cycle Management

Title	Design sales leads generation programme
Code	107524L5
Range	Design sales lead generation programmes for a specific business area in order to explore new customers for selling products and services in both the mass market segment and up-scale customer segment
Level	5
Credit	4
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> Have specialized knowledge in the theories, principles and methods in sales lead generation Be able to: <ul style="list-style-type: none"> Evaluate the different mechanisms of generating customer leads and estimate resource requirement in order to choose the most appropriate approach for the bank Evaluate common approaches in generating sales leads and their effectiveness under different contexts Evaluate the features of products / services offered by the bank in order to identify suitable methods in generating sales lead Evaluate regulations related to sales activities and identify its implication on sales lead generation Design sales leads generation programmes Be able to: <ul style="list-style-type: none"> Design programmes to generate sales leads according to the bank's business objectives, characteristics of target groups and available resources, etc. Develop the objectives, target groups, budget and implementation details of each leads generating programme Design leads generation process including demand generation; sales lead management; inquiry handling; documentary fulfilment; nurturing of prospects; identifying qualified sales; and sales closure by tracking results Develop supporting measures to facilitate sales leads generation Be able to: <ul style="list-style-type: none"> Design customization tools to qualify and score leads based on the unique business requirements of different sales channels or product features Develop support structures to ensure immediate follow-through actions are taken to address the business opportunities Design mechanism to measure conversion rates, fluctuations in lead generation results and other relevant data Design mechanism to monitor sales teams in designing, developing, and implementing their inquiry handling, response management and business-to-business sales leads management process
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> Design of sales lead generation programmes and monitoring measures based on specialized knowledge and analysis on the bank's business objectives and characteristics of target groups, etc.
Remark	