

Specification of Competency Standards for the Retail Banking

Unit of Competency

Sales and Relationship Management > 8.3 Sales Cycle Management

Title	Disseminate promotion materials to sales staff
Code	107530L4
Range	Disseminate promotion materials related to the bank's products and services or marketing and promotional activities to staff with sales accountabilities. This involve sales staff who are responsible for different products and services of various target segments
Level	4
Credit	3
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Understand the work responsibility of sales staff in different teams Be able to: <ul style="list-style-type: none"> • Gather information related to the job responsibilities of different sales teams which include the division of work, responsible products and services and sales targets • Assess the work load and responsibilities of individual sales job role hence to delegate promotion work appropriately 2. Select and provide a range of promotion materials which are customized to the jobs of different sales staff Be able to: <ul style="list-style-type: none"> • Maintain and update related inventory records to ensure a sufficient supplies of tools and materials are available to support the sale activities of frontline sales staff • Collect and disseminate updated promotion materials of new products, sales campaign and promotional programs to all sales and service channels of the bank • Set up effective communication channels for the sales and service units to convey and explain policies, rules and regulations 3. Gather opinions from sales staff on the needs of promotional support required Be able to: <ul style="list-style-type: none"> • Improve planning in promotional support by gathering recommendations of sales staff, providing better insight into customer demand and improving operational efficiency • Organise staff consultation meetings regularly to capture their views on promotion activity support directly
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Provision of useful and timely promotion materials which can facilitate the tasks of sales staff working in different settings. The distribution of materials should demonstrate an accurate understanding of the work and needs of sales team with different responsibilities
Remark	