Specification of Competency Standards for the Retail Banking

Unit of Competency

Sales and Relationship Management > 8.3 Sales Cycle Management

Title	Provide back office support to sales activities
Code	107532L3
Range	Provide information and administrative support to frontline sales staff. This can apply to sales of products and services of any kind and of different volumes
Level	3
Credit	3
Competency	Performance Requirements 1. Provide a range of customer information as requested by sales staff Be able to: • Provide and maintain effective customer server computing environment to support the bank's sale activities according to the bank's guidelines • Compile and maintain customer database and update regularly • Retrieve data of sales call reports, leads source analysis and customer response analysis, etc. from the bank's database by following the request of sales staff • Generate comprehensive management reports on customer accounts by using the standardized templates of different database systems 2. Carry out administrative work by applying the bank's processes to complete different types of transactions Be able to: • Execute internal sales operations service according to the bank's stated procedures • Carry out periodic reviews to collect statistic to support the bank's current and future sales and service delivery activities according to the stated procedures • Provide back office fulfilment and transaction processing activities to complete the sales generated from frontline sales and service channels according to the bank's stated procedures 3. Demonstrate professionalism in supporting frontline activities Be able to: • Take personal effort to ensure that sales operations procedures are conforming to the latest standards and regulatory requirements • Commit to provide efficient support services to co-workers and external business partners
Assessment Criteria	The integral outcome requirements of this UoC are: • Provision of useful statistics independently which can fulfil request of sales staff by adopting standardized templates in different database systems • Execution of administrative duties in selling independently according to the bank's stated procedures
Remark	