

# Specification of Competency Standards for the Retail Banking

## Unit of Competency

### **Sales and Relationship Management > 8.4 Sales Team Management**

Title	Perform sales coaching
Code	107535L5
Range	Conduct sales coaching for front line sales staff who have direct contact with customers. This applies to staff selling different products and services at different targeted market segments
Level	5
Credit	4
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> <li>1. Master knowledge and specialized skills in sales coaching Be able to: <ul style="list-style-type: none"> <li>• Synthesize the responsibilities of strategist, coach, mentor and problem solver so as to play the roles effectively and gain respect and trust from the sales teams</li> <li>• Demonstrate expertise in selling concepts and best sales practices by evaluate the pros and cons of different selling approaches</li> </ul> </li> <li>2. Diagnose sales performance based on evidence collected Be able to: <ul style="list-style-type: none"> <li>• Use a structured approach to provide planning, reviewing, and feedback for both observed and unobserved performance of sales staff</li> <li>• Conduct thorough evaluation of sales effectiveness of the staff and identify improvement areas</li> </ul> </li> <li>3. Develop different methods to enhance performance of sales staff Be able to: <ul style="list-style-type: none"> <li>• Help sales staff develop an improvement strategy and plan clear activity goals and sales targets after analyzing the performance</li> <li>• Employ different methods to enhance sales performance of staff and implement customized performance improvement plans for them</li> <li>• Set up measurement and reviewing mechanism for the improvement plans established for individual sales staff</li> </ul> </li> <li>4. Demonstrate care and support to motivate coachee to strive for better performance in sales Be able to: <ul style="list-style-type: none"> <li>• Employ appropriate methods to help reduce stress and boost up self-confidence of the sales staff after analyzing the characteristics and styles of different coachees</li> <li>• Employ customized methods to inform, delegate, and motivate sales staff to achieve sales objectives</li> <li>• Provide constant encouragement and consequence to sustain and build upon the skills and knowledge learned by sales staff</li> </ul> </li> </ol>
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> <li>• Production of performance improvement plan which is able to improve the performance of individual sales staff. The improvement plan outlines specific actions needed to be carried out by the sales staff, the expected results and the measurement mechanism. Moreover, the plan should be based on the analysis on existing performance and improvement needs</li> <li>• Demonstrate professional skills in coaching by employing appropriate methods after analyzing the characteristics and styles, etc. of different coachees</li> </ul>
Remark	