

Specification of Competency Standards
for the Banking Industry
Unit of Competency

Functional Area - 1. General Enterprise Banking Service Delivery
(Key Function – 1.1 Service Delivery Strategies and Management)

Title	Review the service delivery performance for respective products and channels and make recommendations for improvement
Code	109159L5
Range	Reviewing performance of responsible areas of service transactions conducted for enterprise banking clients. This applies to different types of enterprise banking service delivery including but not limited to cash management services, general loan and credit related services, investment and insurance services, trade finance related services, foreign exchange and money market services and general account services, etc.
Level	5
Credit	4 (For Reference Only)
Competency	<p>Performance Requirements</p> <p>1. Knowledge in the Subject Area</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Demonstrate proficient knowledge in the responsible areas of service delivery by evaluating different concepts related to specific service areas in order to provide advice to clients and their business; • Understand the features of different lines of service delivery of the bank in order to compare and identify suitable solutions which can best suit the business and personal needs of clients. <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Review various streams of service delivery practices by assessing the intelligence of up-to-date market developments; • Develop review schedule and actions, perform review activities as planned • Review the performance of clients' usage of requested services regularly and provide information to relevant parties to follow up; • Evaluate performance of responsible areas of service delivery to monitor whether clients' requirements and the bank standards are met; • Communicate with clients and relevant responsible parties about the performance of service transactions when it is necessary; • Review the current situations, identify impacts on clients and the bank; and determine whether changes in services offering are needed; • Review overall performance of services offered to clients, identify improvement areas and provide recommendations to clients and responsible parties. <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Collect clients' comments proactively on the services offered and probe causes of deviance for further analysis; • Communicate with clients to understand their request, provide advice and ensure their satisfaction.
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Tracking performance of clients' usage of different services offered and analysing if their needs are satisfied;

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	<ul style="list-style-type: none">• Identifying updated service needs of clients regularly and take necessary actions to ensure their changing needs are taken care of;• Provision of recommendations on service enhancement and reporting to relevant parties to follow up.
Remark	