

**Specification of Competency Standards**  
**for the Banking Industry**  
**Unit of Competency**

Functional Area - 1. General Enterprise Banking Service Delivery  
(Key Function – 1.7 Delivery of Account Services)

Title	Promote enterprise banking products and services in business centers
Code	109187L4
Range	Organising of promotional activities in business centers. This applies to different kinds of promotional activities within a business center context and different kinds of enterprise banking products and services.
Level	4
Credit	3 (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"> <li>• Understand the types of products and services offered by the business centers in order to facilitate and arrange the promotion;</li> <li>• Understand the sales plan of the business centers, including the objectives, targets, resources and major approaches, etc. in order to arrange suitable promotional activities;</li> <li>• Understand the characteristics of different promotional methods in order to identify suitable activities for the sales plan of the business centers.</li> </ul> <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Liaise with product development teams and sales teams to identify suitable promotional activities carried out in the business centers;</li> <li>• Prepare the activity plan and ensure adequate and appropriate promotional materials are displayed and distributed;</li> <li>• Monitor the operation of promotional activities; identify potential problems and carry out remedial actions when necessary;</li> <li>• Prepare reference information to instruct business centers personnel to introduce the needs matching features of the promoted items of products and services to customers;</li> <li>• Review result of promotional activities and make suggestion.</li> </ul> <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Comply with the ethical standards and regulatory requirements to ensure products and services recommended to clients are matched with their profiles and needs (suitability test).</li> </ul>
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> <li>• Conducting promotional activities in business centers and providing suitable resources to facilitate the activity. Moreover, suitable remedial actions are executed to ensure a smooth operation when necessary;</li> <li>• Providing accurate and adequate information to customers during the promotion.</li> </ul>
Remark	