Specification of Competency Standards
for the Banking Industry
Unit of Competency

Functional Area - 7. Product Development and Brand Marketing
(Key Function – 7.4 Product Launching Implementation and Management)

Title	Provide product information and training to support the sales and services process
Code	109440L4
Range	Participating in the sales and services process by providing product related knowledge and training to relevant parties. This applies to the launch of different kinds of enterprise banking products.
Level	4
Credit	3 （For Reference Only）
Competency	Performance Requirements 1. Knowledge in the Subject Area Be able to: • Understand the technical features of products in order to handle enquires from internal and external customers independently; • Master the standard procedures of product launching and apply the knowledge to review the sales and services process or approaches in order to identify support required by the sales team. 2. Applications Be able to: • Conduct presentation or training on new products or existing products for transferring knowledge to clients and relevant staff groups according to their needs and product knowledge level to enhance their knowledge; • Handle clients' enquires related to features of the products to ensure they understand the product features. 3. Professional Behaviour and Attitude Be able to: • Perform site visit to ensure sales staff understand all the risks derived from the process of product sales and provide guides to handle; • Take necessary actions to ensure proper sales process is in place to protect customer interest; • Answer enquires from sales staff related to product information and sales procedures to ensure prompt response to the issues are provided and the sales and service process is carried out in a professional manner.
Assessment Criteria	The integral outcome requirements of this UoC are: • Conducting presentation on product information to clients and sales staff. The presentation covers essential materials for clients and sales staff to evaluate the products. • Designing a presentation that allows target audience to understand the information easily and accurately; • Providing precise product information and clarifications to other sales personnel to ensure correct information is conveyed to clients.
Remark	