Specification of Competency Standards
for the Banking Industry
Unit of Competency

Functional Area - 8. Quality Management
(Key Function – 8.4 Customer Experience Management)

Title	Develop procedures and guidelines for feedback management
Code	109474L5
Range	Develop guidelines and standard protocol in dealing with challenges from customers. This applies to customers of different segments and products.
Level	5
Credit	4 （For Reference Only）
Competency	Performance Requirements 1. Knowledge in the Subject Area Be able to: • Possess customer relationship management concepts and techniques and based on the knowledge to evaluate the common characteristics of difficult customers in order to design the service protocol; • Well versed of customer feedback analysis and apply the knowledge to investigate past records of complaints and enquiries received in order to identify common difficult scenarios and develop protocol for dealing with them. 2. Applications Be able to: • Conduct benchmarking studies and evaluate the best practices in banking industries in order to develop suitable strategies for handling difficult customers; • Develop policies and procedures in handling feedback or complaints by customers to ensure the cases are escalated to appropriate level of management; • Develop services standards in handling difficult customers in order to preserve the relationship with the customers and protect the bank's reputation. 3. Professional Behaviour and Attitude Be able to: • Develop strict policies and guidelines in delegating authority to frontline staff in handling requests from customers (e.g. the authority in making concessions); • Define clearly the roles and responsibilities of different parties and ensure relevant individuals understand their accountabilities during the processes.
Assessment Criteria	The integral outcome requirements of this UoC are: • Provision of guidelines and standard protocol to specify desirable and non-desirable actions when dealing with customers' challenges. These should be based on analysis of customers' profiles, past record of complaint cases and best practices in the market, etc.
Remark	