

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

Functional Area - 9. Sales and Relationship Management  
(Key Function – 9.1 Sales Strategies and Implementation Plan Formulation)

Title	Develop marketing and promotional programmes to facilitate sales strategies
Code	109487L5
Range	Define overall marketing and promotional programmes of a particular business area. This applies to the development of different kinds of programmes to help achieve sales targets of different products and services and in various market segments.
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"> <li>• Demonstrate understanding of the fundamental factors of marketing and promotional programmes by analysing various customer segments which the bank aims to introduce / expand the sales of the promoted products and identify the targeted customers;</li> <li>• Possess product knowledge and marketing skills to analyse the features of products / services offered by the bank and identify to what extent they match with the needs of target customers;</li> <li>• Demonstrate understanding of the key elements of marketing and product promotion by analysing the target customers in details and specifying their demographic characteristics, interests, consumer behaviour etc. to find out what are the effective means to influence the target customers.</li> </ul> <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Evaluate the results from customer surveys or focus group analysis when designing the marketing and promotional campaigns to cope with clients' interest;</li> <li>• Establish objectives for promotional campaigns on different groups of target customers which can be aligned with the sales strategies and sales targets;</li> <li>• Allocate resources appropriately among sales promotion, advertising, publicity, and sales team's personal selling to support well rounded promotion;</li> <li>• Develop content, appeal, structure and promotional message and select proper channels to ensure promotional messages can reach the target customers;</li> <li>• Develop budget plan which involves cost breakdowns per territory and promotional mix elements, affordability and competitive parity.</li> </ul> <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Conduct cost and benefit analysis of the marketing campaigns to ensure they are cost effective;</li> <li>• Develop measuring mechanism to track the results of the marketing and promotional campaign hence to ensure the delivery of effective results;</li> <li>• Develop review process to track if pre-set objectives of the campaign are achieved and modify plans as required in order to bring about continuous improvement.</li> </ul>
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> <li>• Proposals of a wide range of sales and promotional campaigns in alignment with the sales strategies of the bank and specify the objectives, analyses of different models,</li> </ul>

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	resources allocation, message content, channel and budget etc. The proposal should be based on analysis on customer characteristics of different segments.
Remark	