

**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	Collect, analyse and report business intelligence information on the financial needs of different client sectors
Code	109489L4
Range	Collect information on market supply and customer demand for the products and services provided by corporate and commercial banks in the same geographical location. This applies to diverse lines of products and services in different enterprise banking business units.
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 how to conduct market research in enterprise banking sector and apply the skills to summarize the features of products and services provided by different banks and the competitive landscape in the enterprise banking sector so as to understand the focus of research programs;</li> <li>• Demonstrate understanding in the research approach by applying the techniques in data collection to different situations in order to gather a comprehensive range of accurate and timely information on market supply and customer demand.</li> </ul> <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Manage market research project, find existing information resources and survey customers to acquire critical market intelligence by providing an independent perspective;</li> <li>• Obtain fore knowledge of competitors strategies and how they are implementing their plans to assist management to predict future challenges and safeguard own business;</li> <li>• Collect necessary information in different situations according to research plans established;</li> <li>• Measure marketing effectiveness and compare results with the range of returns achieved by others who are operating in similar product markets.</li> </ul> <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Step through a structured process for the consolidation of information hence to uncover the comprehensive picture of the market environment;</li> <li>• Report the information analysis and forecast for strategic planning to ensure the analysis is useful and constructive in grasping client's needs.</li> </ul>
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> <li>• A report of presentation of collected data which cover critical factors on market demand and supply. The data should be accurate, timely and presented in an organized format which is easy to read and understand.</li> </ul>
Remark	