

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

Functional Area - 9. Sales and Relationship Management  
(Key Function – 9.2 Pre-Sale Management)

Title	Design sales leads generation programme to attract new prospects and retain existing valued clients
Code	109490L5
Range	Developing campaigns / activities to attract new prospects. This applies to different segments of clients of enterprise banking.
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>• Possess the technical knowhow in generating sales leads and apply in to evaluate common methods / sources in sales leads generation (e.g. referrals from existing customers, conferences / seminars, networking activities, cold call, internet, etc.) in order to design suitable programme to attract new customers;</li> <li>• Demonstrate expertise in market segmentation by customizing campaigns / activities to different groups of customers.</li> </ul> <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Conduct analysis on customer analytics in order to find out sources of selling opportunities;</li> <li>• Construct the profile for potential sales leads and develop suitable programmes in order to attract their interests;</li> <li>• Develop proposal of the sales leads generation programme and evaluate different approaches in marketing campaigns by specifying the format, coverage, theme, goals, etc.;</li> <li>• Keep updated with the changes in customer profile and thoroughly evaluate it to identify their business potential, especially characteristics of enterprise customers from the Mainland China.</li> </ul> <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Set objectives for the sales leads generation and develop the details of operational plan (e.g. roles and responsibilities, resources, venue, target audience, promotion, etc.) in order to hit at the right targets;</li> <li>• Liaise with business partners (e.g. media) who can provide operational facilitation on sales leads generation programmes and have access to large pool of prospect hence to deliver cost effective programmes;</li> <li>• Observe legal and compliance requirements and keep the information of prospects strictly confidential.</li> </ul>
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> <li>• Development of campaigns / activities to acquire new customers or regain loss customers for the bank. The format, coverage and operational details of the campaign / activities should be based on comprehensive analysis on the profile of target customers.</li> </ul>

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

Functional Area - 9. Sales and Relationship Management  
(Key Function – 9.2 Pre-Sale Management)

Remark	
--------	--