

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	Manage and coordinate the sales and promotional activities of different sales and service channels
Code	109491L5
Range	Managing and liaising with different channels such as enterprise banking centers, relationship management sales teams, digital banking services centers and marketing units, etc. when designing and implementing sales or promotion activities. This applies to activities in different formats and for different target client groups.
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"> • Possess expertise knowledge in the coordination of sales promotion activities and apply it to evaluate the capacity and functionalities of different sales and services delivery channels in order to design sales and promotion activities; • Apply the knowledge in sales promotion to assess the strengths and limitations of different sales and service delivery channels in launching different sales related programs and choose the channels which can match with the products / services to be promoted. <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Analyse the financial behaviours and needs of bank customers, including the utilization record of different channels, segmentation data, demographics, survey research and modelling, etc.; • Analyse the sales plans of the bank and assign appropriate responsibilities and goals to different sales and service delivery channels in accordance to their characteristics and nature of different products and services; • Develop business and performance targets of different sales and service channels in order to enhance the sales performance of different channels; • Assist the design and implementation of new channel programmes and product information programs by sharing the insight gained from the past experience; • Formulate plan to strengthen targeted marketing strategies and deepen customers and prospect relationships based on the financial behaviours of clients; • Liaise and determine levels of support required by different channels in each of the sales and promotion activities to ensure effective implementation. <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Provide data to help identify sales barriers and specific problem areas and help in correcting these problems; • Provide tools and techniques necessary for sales and service channels to measure their performance and potential.
Assessment Criteria	The integral outcome requirements of this UoC are:

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	<ul style="list-style-type: none">• Designing sales and promotion plans including periodic sales targets, sales and promotion activities, resources allocation and evaluation tools for different sales and services channels. The layout of design is developed based on the analysis on the characteristics and functions of different channels.
Remark	