

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	Conduct sales prospecting to qualify potential clients
Code	109493L4
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.
Level	4
Credit	3 (For Reference Only)
Competency	<p>Performance Requirements</p> <p>1. Knowledge in the Subject Area</p> <p style="padding-left: 40px;">Be able to:</p> <ul style="list-style-type: none"> • 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; • Possess the knowledge of data collection under different situations in order to gather a comprehensive range of accurate and timely information on market supply and customer demand. <p>2. Applications</p> <p style="padding-left: 40px;">Be able to:</p> <ul style="list-style-type: none"> • Manage market research project, find existing information resources and survey customers to acquire critical market intelligence by providing an independent perspective; • Obtain fore-knowledge of competitors' strategies and how they are implementing their plans to assist management to predict future challenges and safeguard own business; • Measure marketing effectiveness and compare results with the range of returns achieved by others who are operating in similar product markets. <p>3. Professional behaviour and Attitude</p> <p style="padding-left: 40px;">Be able to:</p> <ul style="list-style-type: none"> • Step through a structured process for the consolidation of information; • Report the information analysis and forecast for strategic planning.
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • A report or 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.
Remark	