

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 networking activities to obtain business contacts
Code	109494L4
Range	Participating in different kinds of networking activities in order to obtain more business contacts. This applies to all networking functions in general including means of obtaining potential clients of different segments.
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"> • Demonstrate knowledge in client segmentation by identifying the characteristics, life cycles, interests, hobbies, etc. of target clients / business partners to facilitate the communication with them; • Possess the knowledge in client data storage and analysis by developing a database to store customers' details; • Demonstrate professional interpersonal skills in order to cultivate networks of contacts for exploring information on potential business opportunities. <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Set objective for each contact with existing and / or potential clients and update call report after each contact with them; • Apply effective communication skills (e.g. active listening) during encounters with prospective customers and obtain information in order to identify opportunities; • Develop trusting relationship and manage the expectations of the new acquaintance by addressing the issues and concerns raised by them; • Maintain a strong network of contacts in order to ensure continuous flow of new prospects into the pipeline. <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Demonstrate basic knowledge in social etiquette in order to project a pleasant impression in social functions; • Display a professional image during social functions to promote oneself and the branding of the bank.
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Demonstration of effective communication and interpersonal skills in order to establish a harmonious relationship with potential clients / business partners.
Remark	