

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	Provide support to marketing and promotion activities
Code	109495L4
Range	Provide resources and administrative support to facilitate different kinds of marketing and promotion activities including but not limited to telemarketing, road show, trade fair, market research. This applies to marketing and promotion activities of different products and services rendered to different target groups.
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"> • Acquire information related to the overall marketing strategies of the bank and understand how these affect the marketing activities; • Apply the knowledge and theories in marketing to review the marketing and promotion activities conducted by the competitors; • Understand the objectives, profile of target participants, workflow process, products / services promoted and resources requirement for each of the activities. <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Coordinate the marketing programmes with the bank’s marketing teams which cover the following activities: <ul style="list-style-type: none"> ○ Telemarketing; ○ Road show support service; ○ Survey; ○ Market research; ○ Trade fair; ○ Outline the resource s requirement of each activity and report to management if expenditure exceeds the budget; ○ Prepare, source and deploy necessary tools and materials to support the marketing activities; ○ Participate in different kinds of marketing activities by utilizing skills in event management and carry out post-event evaluation. <p>3. Professional behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Employ suitable methods to collect statistics on resources deployment, participation rate, sales and other activities for evaluation and future planning; • Collect customer feedback and report to management for analysis; • Use different methods to collect and compile information for the participants’ database and update regularly.
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Provision of support to the operation of each activity according to its objectives, workflow and resources requirement, etc.;

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)

	<ul style="list-style-type: none">• Collection of relevant data by using different methods according to the nature of the information to be collected.
Remark	