

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	Disseminate promotion materials to sales staff
Code	109496L4
Range	Disseminating promotion materials related to the bank's products and services or marketing and promotional activities to staff with sales accountabilities. This involves sales staff who is responsible for different products and services of various target 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"> • Understand the work responsibility of sales staff in different teams and gather information related to their job responsibilities of different roles which include the division of work, responsible products and services and sales targets; • Possess the operations knowledge of the sales teams and apply it to assess the workload and responsibilities of individual sales job role hence to delegate promotion work appropriately. <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Maintain and update related inventory records to ensure a sufficient supply of tools and materials are available to support the sales activities of frontline sales staff; • Select and provide a range of promotion materials which are customized to the jobs of different sales staff for their effective applications; • Collect and disseminate updated promotion materials of new products, sales campaign and promotional programmes to all sales and service channels of the bank; • Set up effective communication channels for the sales and service units to convey and explain policies, rules and regulations hence to facilitate effective implementation of promotional programmes. <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Improve planning in promotional support by gathering recommendations of sales staff, providing better insight into clients' demand and improving operational efficiency; • Organize staff consultation meetings regularly to capture their views on promotion activity support and cultivate effective teamwork.
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Provision of useful and timely promotion materials which can facilitate the tasks of sales staff working in different settings. The distribution of materials should demonstrate an accurate understanding of the work and needs of sales team with different responsibilities.
Remark	