

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	Organize record of sales activities and clients' data
Code	109497L3
Range	Recording sales data in every step of the sales cycle which include but not limited to information of customers, products and transactions. This applies to sales of products and services of any kind and of different volumes.
Level	3
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 standard procedures of tracking systems so that the system can be operated independently; • Understand the compliance requirements and take steps to ensure the necessary data of sales activities is recorded to comply with the requirements of the bank's internal tracking system. <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Maintain and update the sales data to ensure its accuracy and integrity according to the bank's guidelines; • Report irregularities or missing sales data and seek information from appropriate means to supplement the insufficiency. <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Generate reports to provide visibility on sales activities and monitor sales results by employing suitable templates; ensure they are presented in accordance with the standards of the bank; • Provide relevant statistics and conduct analysis related to sales cycle management upon request of different authorized parties; • Identify business opportunities / suitable products for customers through analysing data collected and provide insight to relevant parties for their follow up.
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Execution of appropriate actions to ensure the quality of the data in the tracking systems and report irregularities; • Provision of accurate and timely report on sales data which can fulfil the informational requirements as requested by different parties by using suitable templates.
Remark	