

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)

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| Title | Provide back office support to sales activities |
| Code | 109498L3 |
| Range | Provision of information and administrative support to frontline sales staff. This can apply 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"> • Possess knowledge in types and of documents and their usage hence to apply the knowledge to identify documentation (e.g. policy statements, status disclosure) required for the operational processes and issue them in accordance with the bank's guidelines; • Understand the IT operations systems of the bank and provide and maintain effective client server computing environment to support the bank's sales activities according to the bank's guidelines; • Possess the bank's data knowledge to compile and maintain client database and update regularly; <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Retrieve data of sales call reports, leads source analysis and customer response analysis, etc. from the bank's database by following the request of sales staff; • Generate comprehensive management reports on customer accounts by using the standardized templates of different database systems; • Execute internal sales operations service according to the bank's stated procedures to support frontline sales activities; • Carry out periodic reviews to collect statistics to support the bank's current and future sales and service delivery activities according to the bank's stated procedures; • Provide back office fulfilment and transaction processing activities to complete the sales generated from frontline sales and service channels according to the bank's stated procedures. <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Carry out administrative work by applying the bank's compliance on processes management to complete different types of transactions; • Conduct benchmarking and follow the best practices to provide back office support services. |
| Assessment Criteria | <p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Provision of useful statistics independently which can fulfil request of sales staff by adopting standardized templates in different database systems; • Execution of administrative duties in selling independently according to the bank's stated procedures. |
| Remark | |