

Specification of Competency Standards
for the Banking Industry
Unit of Competency

Functional Area - 9. Sales and Relationship Management
(Key Function – 9.4 Account Management and Customer Relationship Management)

Title	Tailor appropriate customer services / products for different clients
Code	109510L5
Range	Evaluation of customer data to design customized marketing programmes and / or public relations activities to promote suitable services / products for specific business areas of different client segments.
Level	5
Credit	4 (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 data analysis by applying it to evaluate real time client information for both marketing and service purposes, along with detailed service center management operations data to design suitable programmes for targeted client segments; • Possess event management skills in order to develop and organize customer interaction programmes / activities. <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Establish different communication channels to provide customers' access to bank product or activity information and provide feedback; • Apply the client data analysis expertise at the account planning phase to scrutinize information about the clients' buying habits, utilization of banking services or demographics to accomplish targeted marketing programmes; • Evaluate the findings of targeted marketing analysis to market the right products to the right customers at the account planning stage. • Develop different programs or activities to interact with customers based on the preference of different market segments; • Develop and implement loyalty programs to engender and enhance customer loyalty; • Design customer interaction processes in the service delivery flow to ensure individual relationship with customer is established. <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Develop cost effective evaluation metric and performance standards for the programmes by utilizing specialized skills in performance measurement; • Select suitable tracking and monitoring methods to evaluate the performance of the programmes; • Design mechanism in analysing and reporting the evaluation on programme's effectiveness which include bottom line figures, customer perception, costs, participation rates etc.
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Designing of programs or activities together with the evaluation mechanism on enhancing customer loyalty to the bank. The design of programs is based on the

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	analysis on the target customers and expertise in designing loyalty programs or activities.
Remark	