

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	Handle clients' enquiries
Code	109513L4
Range	Handling different kinds of customer enquiry appropriately. This applies to enquiries in all forms and in every aspect which can affect customer satisfaction.
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 concepts and theories of customer relationship management and apply it to be familiar with the profiles of different customers; • Possess the knowledge related to the customer's buying habits, utilization of banking services or demographics to accomplish targeted marketing. <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Answer customer's enquiry and provide appropriate feedback or solutions to customers; • Follow up on customer's enquiry and tactfully probe further to uncover genuine needs; • Perform conflict resolution to turn unsatisfactory customers into happy customers who believe the bank cares about their problem and wants to help them. <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Adopt a customer-centric mind set when interact with customers; • Show caring and respect to the customers; react responsively and timely to their demand; • Communicate with customers proactively to probe for their opinions and needs.
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Handling of customer enquiries. The response should be customized to the specific situations so as to employ an appropriate method which can resolve the concerns of customers successfully.
Remark	