

**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	Carry out customer relationship management activities to maintain client relationship
Code	109518L3
Range	Building and maintaining relationship with customers by displaying good customer service Behaviour when interacting with customers in different channels. This applies to different kinds of customers.
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"> <li>• Understand the basic principles and methods in building and maintaining relationship with clients;</li> <li>• Possess knowledge of the bank's customer relationship management plan and policy so as to handle customer related activities appropriately;</li> <li>• Understand the importance of establishing good relationship and the impacts on the bank and based on the belief to interact with clients.</li> </ul> <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Greet clients proactively in a timely and professional manner;</li> <li>• Start conversation with clients in order to have a better understanding on their needs;</li> <li>• Answer client' enquiries by providing appropriate information and follow-up their needs when necessary;</li> <li>• Maintain regular contact with clients and keep clear record of each client contact.</li> </ul> <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Communicate with clients in a polite and professional manner;</li> <li>• Demonstrate customer-centric mindset to observe clients and identify their needs when interacting with them;</li> <li>• Show respect to clients and strive to offer value-added services to them proactively when appropriate.</li> </ul>
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> <li>• Maintaining good and long-term relationships with different kinds of clients by providing value-added services to them via different service channels.</li> </ul>
Remark	