

Specification of Competency Standards
for the Banking Industry
Unit of Competency

Functional Area - 9. Sales and Relationship Management
(Key Function – 9.5 Sales Team Management)

Title	Identify sales training needs and develop sales training strategies and plans
Code	109523L5
Range	Identifying sales training needs throughout the Bank through needs analysis and regular consultation with management teams, HR Development professionals and business managers and sales managers. Comprehensive sales training strategies and implementation plans are compiled based on the information collected. This applies to all types of sales related training.
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"> • Comprehend the skills in staff development (e.g. identifying staff's training needs, conducting training needs analysis, training and development design, etc.) and apply the knowledge to evaluate the skills and knowledge gaps of employees on different products, systems update, compliance and sales techniques; • Demonstrate proficient knowledge of the compliance requirements and the latest regulations and policy changes, new products and services delivery processes information and product due diligence requirements so as to identify sales training needs and design training curriculum; • Demonstrate sound knowledge of the latest development of new products launch in the market hence to recommend counter responses in the development of the bank's sales training strategies and implementation plans. <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Engage sales managers to take part in structured sales training needs analysis to identify both short-term and long- term learning needs for frontline staff in order to close the performance gaps or enhance the sales and marketing capability; • Evaluate the data collected from training needs analysis and build alignment with the bank's business plans to formulate an overall sales training strategies; • Breakdown the sales training strategies into implementable sales training plans; • Design, develop and manage the delivery of sales training programs based on needs identified. <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Develop and deliver an overall talent management programmes to include sales related competences enhancement and sales staff career development process; identify key initiatives to develop sales staff within the sales and service team based on specific roles, market segments and individual staff members' desires; • Collaborate with other internal parties to create career paths for sales and service staff based on individual experiences, goals, skills and abilities.
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Developing sales training strategies and implementation plans based on the needs identified via a structured training needs analysis exercise.

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Remark	
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