

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	Perform sales coaching
Code	109524L5
Range	Conduct sales coaching for front line sales staff who have direct contact with enterprise banking clients. This applies to staff selling different products and services at different targeted market 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 expertise in selling concepts and best sales practices by evaluating the pros and cons of different selling approaches; • Master knowledge and specialized skills in sales coaching and apply them to facilitate staff development. <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Use a structured approach to provide planning, reviewing and feedback for both observed and unobserved performance of sales staff; • Conduct thorough evaluation of sales effectiveness of the staff; diagnose their sales performance based on evidence collected and identify improvement areas; • Help sales staff develop an improvement strategy and plan clear activity goals and sales targets after analysing the performance; • Employ different methods to enhance sales performance of staff and implement customized performance improvement plans for them. <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Employ appropriate methods to help reduce stress and boost up self-confidence of the sales staff after analysing the characteristics and styles of different individuals; • Employ customized methods to inform, delegate and motivate sales staff to achieve sales objectives; • Provide constant encouragement and consequence to sustain and build upon the skills and knowledge learnt by sales staff; • Synthesize the responsibilities of strategist, coach, mentor and problem solver so as to play the roles effectively and gain respect and trust from the sales teams.
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Production of performance improvement plan which is able to improve the performance of individual sales staff. The improvement plan outlines specific actions needed to be carried out by the sales staff, the expected results and the measurement mechanism. Moreover, the plan should be based on the analysis on existing performance and improvement needs; • Demonstrating professional skills in coaching by employing appropriate methods after analysing the characteristics and styles, etc. of different staff coached.

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Remark	
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