

**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	Manage and evaluate sales performance
Code	109525L5
Range	Evaluate sales performance for each individual branch, product team or sales team. This applies to teams 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"> <li>• Possess analytical power and apply the skills to evaluate information about sales, customers, sales teams, and products for a complete view of the sales performance;</li> <li>• Understand the sales target and business strategies of the bank and based on that to analyse pricing experiment in selected customer segments to determine if changes in pricing could impact sales volume and profit;</li> <li>• Understand the business acumen and knowledge on the bank's business strategies to assess customer profitability, buying behaviour, product mix, product and service delivery, and cross-selling and up-selling opportunities in order to analyse sales performance.</li> </ul> <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Monitor product sales performance by geographic location, customer segment and seasonality;</li> <li>• Analyse sales expenses vs. revenue generated, forecast accuracy, and sales team profitability to determine sales effectiveness;</li> <li>• Plan account management activities to monitor sales effectiveness. These activities include: <ul style="list-style-type: none"> <li>○ Sales call reporting;</li> <li>○ Sales pipeline management;</li> <li>○ Performance measurement for sales team and individual sales staff.</li> </ul> </li> </ul> <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Conduct accurate analysis to gain complete insight into different financial products and product lines' profitability;</li> <li>• Use graphical analysis to quickly assess actual sales performance vs. targets and sales management forecasts hence to provide an effective tool for decision making;</li> <li>• Associate sales data with financial, marketing and customer information to identify existing gaps in achieving sales effectiveness.</li> </ul>
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> <li>• An evaluation of sales related statistics of individual team which accurately depicts the sales effectiveness. The evaluation identifies the improvement areas and displays analyses of different sources of information.</li> </ul>
Remark	