

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)

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| Title | Execute regular sales planning activities |
| Code | 109529L4 |
| Range | Planning and managing sales activities through different service channels. This includes a wide range of enterprise banking products and services offering at different targeted market segments. |
| 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"> • Comprehend ample knowledge and master the methodology in conducting sales and planning meetings; • Possess sales management skills and apply it to monitor, motivate, and evaluate the performance of sales team members; <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Use sales management techniques to prepare a comprehensive sales meeting agenda which allows for dialogue, collaboration and interaction regarding the competition, pricing, territories and sales strategy in accounts. • Create the right atmosphere by ensuring the sales meetings are focused and constructive; add value by helping the team better able to close business and have shared ownership; • Stretch and challenge team members' skills during the meetings to keep them sensitive and effective in identifying customer needs and turn them into selling opportunities; • Recognize the tough challenge of the sales team, provide support and build motivation into every team meeting; • Communicate and have individual team members to report on their sales update, activity update and pipeline (progress of on-going sales activity) update. <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Set and maintain a high standard of sales discipline in terms of qualitative and quantitative measures for the sales team; • Lead team members to execute efficient acquisition activities including innovative means through digital channels; • Take steps to ensure all related team members contribute their greatest effort and honestly in working towards the planned team goals. |
| Assessment Criteria | <p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Preparation of sales team meetings and planning sales activities systematically; stretching and challenging team members' capability in generating business; • Development of innovative approaches and channels of sales acquisition through effective sales preparation. |
| Remark | |