

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	Provide regular sales related training on products, system update, compliance and internal regulations
Code	109530L4
Range	Design and Provision of customized sales related training on products, system update, compliance and internal regulations to frontline employees. This applies to sales and service employees of different ranks, job families and positions.
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"> • Possess the training and development knowledge and apply it to evaluate the skills and knowledge gaps of employees on different products, systems update, compliance and internal regulations; • Understand the compliance requirements and keep abreast of regulations and policy changes, new products and services delivery processes information and product due diligence requirements do as to provide appropriate learning to frontline employees; • Understand the trend of innovative products in the market and keep up to date on the development of market information on new products launch hence to recommend counter responses in the bank's training design; • Evaluate changes in sales related competency requirements and provide input to structure effective sales training. <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Formulate and communicate new ideas and suggestions on sales and services delivery that will improve profitability and efficiency of the bank; • Design, develop and manage the delivery of sales related training programmes based on needs identified; • Present sales related information and skills on products, systems update, compliance and internal regulations at formal training events and internal team meetings, as needed; • Coordinate, facilitate, deliver and/or mobilize subject matter experts as appropriate, to create and deliver sales related content and materials for training as continuous process improvement. <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> • Collaborate with other internal parties to supplement the career development paths for frontline staff and plan necessary training on products, system update, compliance and internal regulations; • Upkeep training record of frontline staff for the overall planning of knowledge management; • Structure and plan continuous professional development activities for sales staff.
Assessment Criteria	The integral outcome requirements of this UoC are:

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	<ul style="list-style-type: none">• Designing or revision of the sales related training curriculum to cope with the changing regulations, compliance, product revamp and systems updates needs;• Delivery of sales training related training on products, systems update, compliance and internal regulations; providing coaching and mentorship guidance to frontline employees.
Remark	