

Investment Platform > Product Development and Launching

Title	Provide product training to sales staff
Code	106811L5
Range	Providing trainings to equip sales staff with required product knowledge and facilitate the sales. This applies to different kinds of investment products to private banking clients.
Level	5
Credit	4 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Demonstrate professional knowledge in investment products <p>Be able to:</p> <ul style="list-style-type: none"> • Demonstrate professional knowledge in economic and finance in order to evaluate the market developments and apply those knowledge on day-to-day work • Demonstrate professional knowledge in different private banking products and services in order to deliver the trainings 2. Design training content <p>Be able to:</p> <ul style="list-style-type: none"> • Evaluate the needs of staff according to their roles to ensure relevant staff is fully up to date with all products and services • Develop and conduct trainings on wealth management related knowledge (e.g. current economic and market landscape) and theories (e.g., investment, portfolio management) to facilitate the jobs of different staff • Develop training programs for different products to explain the product features, structures, risks • Upload useful product information and counterparty assessment onto digital platform for frontline staff easy access 2. Keep staff updated of latest development <p>Be able to:</p> <ul style="list-style-type: none"> • Provide staff with updated market information, e.g. new announcements, competitors' information, regulatory requirements and proper discloser in selling the products, .etc. and illustrate the impacts on different products • Provide staff with updates on economic and financial markets as well as guidance on investment strategies • Provide updates and trainings on new products, covering the product features, target clients, and operational procedures, etc. 3. Ensure effectiveness of training <p>Be able to:</p> <ul style="list-style-type: none"> • Design and select the training methodology according to the profile of target participants, e.g. prior knowledge, learning styles, years of experience, job roles, etc. • Evaluate the content of the training and structure the training in a way that can facilitate participants to master the knowledge / skills in an effective manner
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Development of product trainings to different types of staff. The methodology chosen and the content design should be based on analysis of the training content, job requirements of different staff and profiles of target participants, etc.
Remark	