

Investment Platform > Product Sourcing	
Title	Develop distribution strategies for different products
Code	106817L5
Range	Developing distribution strategies for different products. This applies to different kinds of investment products developed by the bank or external product providers which are targeted to private banking clients.
Level	5
Credit	4 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Possess knowledge in selling investment products <p>Be able to:</p> <ul style="list-style-type: none"> • Demonstrate professional knowledge in investment and finance in order to understand the product structures • Evaluate the profiles of private banking clients in order to select and design appropriate distribution strategies 2. Design the distribution strategies <p>Be able to:</p> <ul style="list-style-type: none"> • Evaluate the product structures and determine segments of private banking clients that are suitable for the products • Assess the needs for engaging third-party, conduct initial and on-going due diligence on selected distributors to assess the risks related to fulfilling legal or contractual requirements • Monitor sales performance and review distribution strategies 3. Facilitate the selling process <p>Be able to:</p> <ul style="list-style-type: none"> • Analyze the profile of target clients and prepare sales / marketing information to provide clients with appropriate information and provide a balanced view on the products • Develop suitable product trainings to sales staff / distributors to ensure they have a good level of knowledge on the products, e.g. product features, risks, projected returns, etc.
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Development of distribution strategies for selling products to private banking clients. This should be based on analysis on the product features and clients profile in order to ensure product suitability. • Provision of product information / training to relevant stakeholders. The content should be tailored to informational needs of different stakeholders and able to provide a fair and balanced view on the products.
Remark	