

Client Management, Advisory and Support > Client Prospecting

Title	Determine the strategic approach for obtaining business deals
Code	106844L6
Range	Developing strategy (e.g. products, credit facilities, pricing, terms and conditions) and structure the negotiation approach for business acquisition. This applies to different segment of private banking clients.
Level	6
Credit	5 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> <li>1. Conduct research on business environment                             <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Evaluate the macroeconomic conditions (e.g. economic, political, regulation) and the impacts on the selling activities of the bank</li> <li>• Conduct comprehensive analysis on the profiles and needs of clients</li> <li>• Conduct research to track the changes in internal and external environment and promptly measure the impacts on the bank's selling activities</li> </ul> </li> <li>2. Evaluate potential profitability of business deals                             <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Develop a plan in pursuing the business deals by specifying the goals to be achieved according to the bank's objectives and how to meet client needs</li> <li>• Conduct analysis on the risk exposure of the bank associated in the business deals</li> <li>• Analyze the strengths and competitive advantage of the bank in order to develop the sales approach &amp; messages</li> <li>• Estimate the probability of risk of each business deal in order to determine the go and no-go decision</li> </ul> </li> <li>3. Structure solutions to clients                             <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Coordinate with product specialists to construct a customized solutions according to the needs of clients</li> <li>• Develop the selling approach by specifying pricing, value-added services , terms and conditions, etc. offered to the clients</li> </ul> </li> </ol>
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> <li>• Formulation of strategies to specify the product solutions and other services offered to the clients in order to acquire the business deals. These should be based on consolidated findings from research and analyses across different areas, such as evaluati</li> </ul>
Remark	