

Client Management, Advisory and Support > Client Prospecting

Title	Identify and originate new client relationship
Code	106847L5
Range	Building up new connections with potential clients. This applies to different segments of HNW clients for private banking businesses.
Level	5
Credit	4 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Demonstrate professional knowledge in communication <p>Be able to:</p> <ul style="list-style-type: none"> • Evaluate characteristics and styles of different prospects in order to employ the suitable communication styles • Demonstrate professional knowledge in private banking business in order to arouse the interest of the prospects 2. Initiate new relationship <p>Be able to:</p> <ul style="list-style-type: none"> • Generate leads through different channels e.g. prospecting, networking, referrals and attending events / sales meetings and generate list of prospective clients • Obtain information from prospects to identify opportunities in sales, new products / services • Deliver the bank's propositions, products and services to clients as appropriate in order to solicit their interests • Manage pipeline of requests from prospects and provide prompt response • Maintain list of prospects for tracking and follow up 3. Maintain professionalism <p>Be able to:</p> <ul style="list-style-type: none"> • Ensure compliance with applicable regulatory requirements in different regions • Demonstrate advanced communication and interpersonal skills in order to develop a positive impression in prospects
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Development of new connections with the targeted clients group which can successfully build up the pipeline.
Remark	