

Client Management, Advisory and Support > Account Management and Servicing

Title	Manage customer profile and sales record
Code	106856L4
Range	Manage customer information of the bank in specific business area or operation unit. This includes all information related to bank's existing customers such as personal information, transaction record and service reports etc.
Level	4
Credit	4 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Identify kinds of information needed by the bank Be able to: <ul style="list-style-type: none"> • Evaluate different kinds of customer information and assess the use in bank's business and operations • Evaluate the up-to-date methods of information management to select a suitable approach for the bank 2. Develop system and practices for recording customer and sales data Be able to: <ul style="list-style-type: none"> • Develop and implement systems to record sales activities from initial customer contact to successful close of a banking transaction • Build basic systems and practices of constructing customer profile and sales record to help analyze financial standings of customers; and translate data into customer needs 3. Design report format to cater to the informational needs of different parties Be able to: <ul style="list-style-type: none"> • Manage the maintenance of customer transaction record to facilitate forecasts and view anticipated revenue by a variety of date ranges. i.e. monthly, quarterly, annually • Design the template of customer transaction reports which allow sales teams of different channels to analyze opportunities by lead source, geographic location, bank account, and customer segment • Design the template of reports and presentation format of statistics to serve as input for customer relationship management plan
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Provision of data management systems and report format which is able to report accurate and timely customer information. The design of the systems is based on an accurate understanding of the needs of different parties and allow an effective and efficient
Remark	