Client Management, Advisory and Support > Account Management and Servicing

Title	Maintain long term relationship with clients
Code	106858L4
Range	Developing, managing and retaining a portfolio of HNW client segment, dedicated relationship management
Level	4
Credit	4 (for reference only)
Competency	Performance Requirements 1. Identify measures in relationship building Be able to: • Demonstrate proficient understanding in the different methods of relationship building in order to maintain regular contact with clients • Summarize the key characteristics, styles and preferences of private banking clients in order to employ suitable methods in maintaining a long-term relationship 2. Develop existing relationship Be able to: • Maintain frequent and timely communication with customers to enhance knowledge of client situation • Handle their enquiries; respond to client needs and requests in a timely and efficient manner • Identify new business opportunities; pursue cross-sell and other business opportunities which benefit the client • Provide market updates and other relevant information (e.g. research reports, new product information) to clients as value added service 3. Maintain professionalism Be able to: • Ensure compliance with relevant regulatory requirements regarding selling and providing investment recommendations to private banking clients in different regions • Ensure confidentiality of client information by observing relevant regulatory requirements (e.g. data privacy)
Assessment Criteria	The integral outcome requirements of this UoC are: • Provision of different methods in maintaining relationship with private banking clients. The methods should be tailored to the profile of different private banking clients.
Remark	