

Business Management and Strategy > Sales Strategies & Implementation Plan Formulation

Title	Provide back office support to sales activities
Code	106885L3
Range	Provide information and administrative support to frontline sales staff. This can apply to sales of products and services of any kind and of different volumes.
Level	3
Credit	3 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> <li>1. Provide a range of customer information as requested by sales staff                             <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Identify documentation (e.g. policy statements, status disclosure) required for the operational processes and issue them in accordance with the bank's guidelines</li> <li>• Provide and maintain effective customer server computing environment to support the bank's sales activities according to the bank's guidelines</li> <li>• Compile and maintain customer database and update regularly</li> <li>• Retrieve data of sales call reports, leads source analysis and customer response analysis, etc. from the bank's database by following the request of sales staff</li> <li>• Generate comprehensive management reports on customer accounts by using the standardized templates of different database systems</li> </ul> </li> <li>2. Carry out administrative work by applying the bank's processes to complete different types of transactions                             <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Execute internal sales operations service according to the bank's stated procedures</li> <li>• Carry out periodic reviews to collect statistic to support the bank's current and future sales and service delivery activities according to the stated procedures</li> <li>• Provide back office fulfillment and transaction processing activities to complete the sales generated from frontline sales and service channels according to the bank's stated procedures</li> </ul> </li> </ol>
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> <li>• Provision of useful statistics independently which can fulfill request of sales staff by adopting standardized templates in different database systems.</li> <li>• Execution of administrative duties in selling independently according to the bank's stated procedures.</li> </ul>
Remark	