

Specification of Competency Standards of the Insurance Industry

**Unit of Competency**

**Functional Area: Sales & Distribution Management**

Title	Provide support services for channel partners
Code	105496L4
Range	This unit of competency is applicable to those who are required to provide support services for channel partners. It involves the provision of training, marketing materials for different insurance products, and support services for channel partners.
Level	4
Credit	4 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> <li>1. Possess knowledge in company's distribution channels <ul style="list-style-type: none"> <li>• Comprehend corporate channel distribution strategy</li> <li>• Comprehend company's products and target segments</li> <li>• Comprehend company's procedures for underwriting, customer administration and claims handling</li> <li>• Comprehend support services committed to channel partners</li> </ul> </li> <li>2. Provide channel support services <ul style="list-style-type: none"> <li>• Provide product training for channel partners</li> <li>• Advise channel partners on company's procedures for underwriting and policy services</li> <li>• Work with relevant units to develop promotional materials, including product leaflets, plan samples and premium calculation tool kit, for channel sales personnel</li> <li>• Provide support hotlines for channel partners</li> <li>• Provide reports and statistics on support activities</li> <li>• Provide prompt assistance to channel partners upon requests</li> </ul> </li> <li>3. Commit to provide efficient support services for channel partners <ul style="list-style-type: none"> <li>• Provide timely support services for channel partners, including training, administrative and operational services</li> <li>• Develop informative promotional materials to assist channel sales personnel in advertising products</li> </ul> </li> </ol>
Assessment Criteria	<p>The integral outcome requirements of this unit of competency are:</p> <ul style="list-style-type: none"> <li>• Able to provide the necessary support to channel partners</li> <li>• Able to direct channel partners to follow company's procedures</li> <li>• Able to develop promotional materials to facilitate channel sales personnel.</li> </ul>
Remark	This unit of competency is also applicable to general insurers and life insurers.