

Specification of Competency Standards of the Insurance Industry

Unit of Competency

Functional Area: Sales & Distribution Management

Title	Apply coaching and mentoring skills to guide individual brokers
Code	105660L5
Range	This unit of competency is applicable to those who are responsible for managing brokerage operations. It involves application of coaching and mentoring skills to guide individual brokers. It requires assessing the needs of individual brokers to plan the coaching and mentoring programmes, developing mutually agreed goals with brokers, and applying coaching and mentoring skills to guide the brokers to achieve agreed goals.
Level	5
Credit	4 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Possess knowledge of coaching and mentoring <ul style="list-style-type: none"> • Comprehend principles of coaching and mentoring • Familiarize with the processes of coaching and mentoring • Recognize limitations of coaching and mentoring 2(a). Assess the needs of individual brokers <ul style="list-style-type: none"> • Identify strength and weaknesses of individual brokers • Align individual goals with organization objectives • Develop objectives of coaching and mentoring • Plan the coaching and mentoring programmes 2(b). Deliver coaching and mentoring programmes <ul style="list-style-type: none"> • Develop mutually agreed goals with brokers • Arrange coaching and mentoring sessions • Monitor effectiveness of coaching and mentoring sessions • Review progress toward agreed goals 2(c). Improve coaching and mentoring techniques <ul style="list-style-type: none"> • Review coaching and mentoring process from time to time • Identify and reinforce effective techniques to guide brokers based on review findings 3. Apply effective coaching and mentoring skills to enhance individual performance <ul style="list-style-type: none"> • Design effective coaching and mentoring programme to cater the needs of individual brokers • Deliver effective coaching and mentoring programme to assist individual brokers in accomplishing predefined goals • Evaluate the effectiveness of coaching and mentoring techniques and improve as needed.
Assessment Criteria	<p>The integrated outcome requirements of this unit of competency is:</p> <ul style="list-style-type: none"> • Able to identify strengths and weaknesses of individual brokers and develop appropriate coaching and mentoring programmes accordingly • Able to deliver coaching and mentoring programmes to achieve mutually agreed targets • Able to review and reinforce effective coaching and mentoring techniques based on process review.
Remark	