

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 agents
Code	105525L5
Range	This unit of competency is applicable to those who are responsible for managing sales operations. It involves application of coaching and mentoring skills to guide individual agents. It requires assessing the needs of individual agents to plan the coaching and mentoring programmes, developing mutually agreed goals with agents, and applying coaching and mentoring skills to guide the agents to achieve agreed goals.
Level	5
Credit	3 (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 • Familiar with the processes of coaching and mentoring • Recognize limitations of coaching and mentoring 2(a). Assess the needs of individual agents <ul style="list-style-type: none"> • Identify strength and weaknesses of individual agents • 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 agents • 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 agents based on review findings 3. Apply effective coaching and mentoring skills to enhance agent performance <ul style="list-style-type: none"> • Design effective coaching and mentoring programmes to cater the needs of individual agents • Deliver effective coaching and mentoring programmes to assist individual agents to accomplish 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 staffs 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	This unit of competency is also applicable to general insurers and life insurers.