

Specification of Competency Standards for the Retail Banking

Unit of Competency

Retail Banking Service Delivery > 1.1 Delivery of Branch and Account Services

Title	Design service delivery activities for branch
Code	107290L5
Range	Design the procedures of frontline service delivery in branch
Level	5
Credit	4
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Analyse requirements in service delivery <ul style="list-style-type: none"> Be able to: <ul style="list-style-type: none"> • Analyse policies and goals in sales and services delivery to design procedures in service delivery which can align with the bank's strategies • Analyse the operations of the branch and types of products / services offered in order to design the procedures in service delivery • Analyse the needs of customers on branch services in order to design the procedures 2. Design procedures of service delivery in branch <ul style="list-style-type: none"> Be able to: <ul style="list-style-type: none"> • Develop and review guidelines and procedures for delivery of quality services in an efficient manner • Design mechanism in tracking performance of service delivery in branch • Identify improvement areas on service delivery in branch and devise corresponding improvement plans • Design assessment tools to review regularly how customers benefit from the services provided by the bank and how well the bank's service systems can address their needs 3. Cooperate with other business and operation units for service delivery at branches <ul style="list-style-type: none"> Be able to: <ul style="list-style-type: none"> • Cooperate with different business and operation units in product development and work with IT department on system design and enhancement which will affect the delivery procedures • Cooperate with different business and operation units in formulating the procedures of sales and service delivery activities in branches 4. Exhibit professionalism in developing measures to ensure quality of customer services throughout the selling process <ul style="list-style-type: none"> Be able to: <ul style="list-style-type: none"> • Establish standards of customer service quality in different selling stage and scenarios to ensure customer interest is always treated as highest priority • Design processes and service standards to ensure bank requisite customer service is delivered in proper manner • Develop customer service strategies for targeted customers which can address customer needs and take full advantage of new business opportunities at the same time • Design service improvement programs for different sales channels which are essential for customer acquisition and retention

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Assessment Criteria	The integral outcome requirements of this UoC are: <ul style="list-style-type: none">• Design on the procedures on service delivery after analyzing the bank's strategies, operations of branches and needs of customers• Design measures to ensure the quality of services during the entire selling processes. The design should be based on the analysis on the characteristics of different customers segments and their requirements
Remark	