

Specification of Competency Standards for the Retail Banking

Unit of Competency

Retail Banking Service Delivery > 1.5 Delivery of Services in Other Channels (e.g. e-banking, digital banking, ATM and call centre)

Title	Oversee the direct sales service delivery
Code	107328L4
Range	Delivery of retail banking services via performing direct sales and digital sales team management including the development, execution and monitoring of direct sales plans
Level	4
Credit	3
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Understand targets of direct sales teams Be able to: <ul style="list-style-type: none"> • Understand the assigned targets of direct sales teams in order to determine appropriate actions to facilitate achievement of the targets 2. Monitor the execution of direct sales plans Be able to: <ul style="list-style-type: none"> • Plan specific action steps to promote products and services of the bank according to the established strategies • Set realistic sales targets for direct sales and digital sales team in alignment with the bank's overall sales and marketing strategies • Solicit and organise resources from relevant departments or units to support the scheduled direct sales and digital sales campaigns when necessary 3. Monitor progress of direct sales plans and evaluate effectiveness Be able to: <ul style="list-style-type: none"> • Monitor progress of individual direct sales and digital marketing campaigns and adjust plans when necessary • Review achievement of individual direct sales and digital marketing campaigns and make recommendations for improvement if similar campaign is undertaken in the future
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Direct sales and digital sales plans with specific sales goals and action items are devised in alignment with the bank's strategy • Realistic sales targets of direct sales and digital sales team and individual team members are set and monitored • Improvement needs are identified according to the results of direct sales and digital sales plans' monitoring
Remark	