

Specification of Competency Standards for the Retail Banking

Unit of Competency

Sales and Relationship Management > 8.3 Sales Cycle Management

Title	Record and report sales activities
Code	107531L3
Range	Record sales data in every step of the sales cycle which include but not limited to information of customers, products and transactions. This can apply to sales of products and services of any kind and of different volumes
Level	3
Credit	3
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Understand the tracking mechanism in the bank Be able to: <ul style="list-style-type: none"> • Understand the standard procedures of tracking systems so that the system can be operated independently • Ensure the necessary data of sales activities is recorded to comply with the requirements of the bank's internal tracking mechanism 2. Ensure the quality of the record of sales data in the tracking systems Be able to: <ul style="list-style-type: none"> • Maintain and update the data to ensure its accuracy and integrity according to the bank's guidelines • Report irregularities or missing data and seek information from appropriate means to supplement the insufficiency 3. Generate report of sales data Be able to: <ul style="list-style-type: none"> • Generate reports to provide visibility on sales activities and monitor sales results by employing suitable templates • Provide relevant statistics and conduct analysis related to sales cycle management upon request of different parties
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> • Execution of appropriate actions to ensure the quality of the data in the tracking systems and report irregularities • Provision of accurate and timely report on sales data which can fulfil the informational requirements as requested by different parties by using suitable templates
Remark	