

SKILLS FRAMEWORK FOR FINANCIAL SERVICES SKILLS MAP - AGENCY DIRECTOR/SEGMENT LEAD					
Sector	Financial Services				
Track	Sales, After Sales, Distribution and Relationship Management				
Occupation	Financial Planner				
Job Role	Agency Director/Segment Lead				
Job Role Description	The Agency Director/Segment Lead is responsible for the overall strategy of the agency or segment. He/She connects with the various partners and distribution channels to bring their products to market. He is responsible for formulating the policies and initiatives for the agency. He sets the targets for the agency and directs the agency in meeting the Key Performance Indicators (KPIs) that drive the agency's performance. He also provides mentorship to the teams.				
	The Agency Director/Segment Lead is strategic and forward looking, setting the vision and direction for the agency and driving its achievement through disciplined agency management. He is also comfortable in working with senior stakeholders, and has strong interpersonal skills to forge relationships with external parties and also to lead the agency.				
Critical Work Functions and Key Tasks / Performance Expectations	Critical Work Functions	Grow agency business offerings	Key Tasks	Performance Expectations (For legislated / regulated occupations)	
			Establish vision and broad direction for the agency		If agency provides advice directly to customers on life insurance products, Capital Markets and Financial Advisory Services (CMFAS) certification is required. Relevant modules include but are not limited to: 5, 9, 9A
			Build strategic imperatives to support the vision and broad direction for the organisation		
			Establish key partnerships and distribution channels for the organisation		
			Create new channels for sales growth		
			Ensure agency is up-to-date with all new developments in the industry		
			Deepen relationships with existing business partners and acquire new business partners to expand portfolio of products and services		
	Manage contracts with business partners				
	Manage recruitment, development and performance management of team	Recruit agency team managers			
		Oversee training and development of teams			
		Allocate resources for training and development of teams			
		Develop KPIs to measure performance of teams			
		Provide mentorship and coaching to teams			
		Drive culture of agency			
Skills and Competencies	Technical Skills and Competencies		Generic Skills and Competencies (Top 5)		
	Account Management	Level 5	Leadership	Advanced	
	Business Performance Management	Level 6	Developing People	Advanced	
	Cash Flow Reporting	Level 4	Teamwork	Advanced	
	Channel Management	Level 5	Communication	Advanced	
	Client Investment Suitability	Level 5	Interpersonal Skills	Advanced	
	Customer Acquisition Management	Level 5			
	Ethical Culture	Level 5			
	Financial Analysis	Level 5			
	Learning and Development	Level 5			
	Market Profiling	Level 5			
	Partnership Management	Level 5			
	People Performance Management	Level 5			

	Personal Finance Advisory	Level 5		
	Product Advisory	Level 5		
	Stakeholder Management	Level 5		
Programme Listing	For a list of Training Programmes available for the Financial Services sector, please visit: www.skillsfuture.sg/skills-framework/financial-services			

The information contained in this document serves as a guide.