

SKILLS FRAMEWORK FOR FINANCIAL SERVICES SKILLS MAP - AGENCY MANAGER/TEAM LEAD				
Sector	Financial Services			
Track	Sales, After Sales, Distribution and Relationship Management			
Occupation	Financial Planner			
Job Role	Agency Manager/Team Lead			
Job Role Description	The Agency Manager/Team Lead is in charge of managing teams and ensuring they are able to achieve their sales targets. He/She formulates strategies to drive the sale of products and services, and creates opportunities for the teams to expand their customer network. He is also in charge of setting team targets, training and development and hiring and retention of team members.			
	The Agency Manager/Team Lead's duties may require him to be contactable on weekends and after office hours. He possesses strong leadership skills and is able to manage teams effectively and develop ways to motivate them.			
Critical Work Functions and Key Tasks / Performance Expectations	Critical Work Functions	Key Tasks		Performance Expectations (For legislated / regulated occupations)
	Grow agency business offerings	Develop lead generation opportunities to deepen and strengthen partnerships		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
		Propose new channels for sales growth		
		Evaluate local industry product and regulatory trends and developments		
		Drive development of organisation's product and service offerings		
		Formulate sales strategies and targets for the different products and drive the organisation's cross-selling abilities		
		Formulate organisation's criteria for market segmentation and customer selection		
		Keep abreast of legal and regulatory compliance requirements		
	Acquire and manage customers	Set targets for sales teams		
		Formulate customer acquisition strategies and organisational propositions to position the organisation		
		Disseminate compliance and regulatory frameworks to teams		
		Resolve escalated conflicts		
		Oversee customer management activities		
		Ensure adherence to claims processes and procedures		
	Manage recruitment, development and performance management of team	Recruit agency team members		
		Train and develop team members and ensure they are updated on product knowledge, policies, and procedures		
		Design reward schemes to motivate team members on generating leads		
		Ensure teams are aware of and achieve Key Performance Indicators (KPIs)		
		Engage team in driving recruitment and manpower growth		
		Develop the right culture for the agency		
Skills and Competencies	Technical Skills and Competencies		Generic Skills and Competencies (Top 5)	
	Account Management	Level 4	Communication	Advanced
	Business Performance Management	Level 5	Interpersonal Skills	Advanced
	Cash Flow Reporting	Level 3	Leadership	Advanced
	Client Investment Suitability	Level 4	Developing People	Advanced
	Customer Acquisition Management	Level 4	Teamwork	Advanced
	Customer Experience Management	Level 4		
	Customer Relationship Management	Level 4		

<b>Skills and Competencies</b>	Ethical Culture	Level 4		
	Financial Analysis	Level 4		
	Learning and Development	Level 4		
	Market Profiling	Level 4		
	Partnership Management	Level 4		
	People Performance Management	Level 4		
	Personal Finance Advisory	Level 4		
	Product Advisory	Level 4		
	Stakeholder Management	Level 4		
<b>Programme Listing</b>	For a list of Training Programmes available for the Financial Services sector, please visit: <a href="http://www.skillsfuture.sg/skills-framework/financial-services">www.skillsfuture.sg/skills-framework/financial-services</a>			

The information contained in this document serves as a guide.