SKILLS FRAMEWORK FOR FINANCIAL SERVICES
SKILLS MAP - SALES AND DISTRIBUTION SPECIALIST/COVERAGE OFFICER

Sector	Financial Services
Track	Sales, After Sales, Distribution and Relationship Management
Occupation	Sales and Distribution Specialist
Job Role	**Sales and Distribution Specialist/Coverage Officer**
Job Role Description	The Sales and Distribution Specialist/Coverage Officer is responsible for client acquisition and management, which includes identifying new clients and managing relationships with them. He/She is focused on understanding individual clients' needs to deliver customised solutions to them. He is able to collaborate with others to create products that are beneficial for clients. He presents information to clients to communicate how the organisation's solutions can assist them. The Sales and Distribution Specialist/Coverage Officer possesses strong interpersonal skills to build rapport with the clients, and is methodical to ensure that clients' data are accurately captured and used to create tailored solutions for them. He may have to spend a large proportion of his time outside the office engaging and acquiring clients. He is organised and driven to achieve sales targets.

Critical Work Functions and Key Tasks / Performance Expectations

Critical Work Functions	Key Tasks	Performance Expectations (For legislated / regulated occupations)
Acquire and manage clients	Identify new markets for clients and acquire them through conferences, industry events and networking	If role is scoped to provide advice directly to customers on investment strategies that cover dealings in securities, futures, collective investment schemes, REITs, funds and/or capital markets, Capital Markets and Financial Advisory Services (CMFAS) certification is required. Relevant modules include but are not limited to: 1A, 1B, 2A, 3, 4A, 4B, 5, 6, 6A, 8, 8A, 10
	Conduct market research, financial analysis and client presentations	
Specific to Asset Management Acquire and manage clients	Build relationships and networks to secure Requests for Proposal (RFPs) and grow distribution network	
Specific to Investment Banking Acquire and manage clients	Onboard clients and conduct acceptance, Know Your Customer (KYC) and Anti-Money Laundering (AML) checks	
	Manage client information and documentation	
Determine clients' needs	Conduct client profiling	
	Perform client financial needs analyses	
Recommend solutions to clients	Identify financial solutions for clients	
	Work with product teams to structure financial solutions for clients	
	Propose and pitch financial solutions to clients	

Skills and Competencies

Technical Skills and Competencies		Generic Skills and Competencies (Top 5)	
Channel Management	Level 4	Communication	Advanced
Customer Acquisition Management	Level 4	Interpersonal Skills	Advanced
Customer Relationship Management	Level 4	Service Orientation	Intermediate
Ethical Culture	Level 4	Problem Solving	Intermediate
Networking	Level 4	Decision Making	Intermediate
Proposal Management	Level 4		
Sales Strategy	Level 4		
Sales Target Management	Level 4		
Stakeholder Management	Level 4		
Specific to Asset Management			
Product Advisory	Level 4		
Strategy Planning	Level 4		
Specific to Investment Banking			
Customer Acceptance Checking and Onboarding	Level 3		

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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.