

**SKILLS FRAMEWORK FOR FINANCIAL SERVICES
TECHNICAL SKILLS AND COMPETENCIES (TSC) REFERENCE DOCUMENT**

TSC Category	Customer Relationship and Stakeholder Management					
TSC	Account Management					
TSC Description	Manage, maintain and grow the sales and relationships with a specific customer or set of accounts. This includes in-depth customer engagement, relationship-building and provision of quality solutions and service to address customers' needs efficiently and generate revenue.					
TSC Proficiency Description	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6
		FSE-SNM-2030-1.1	FSE-SNM-3030-1.1	FSE-SNM-4030-1.1-1	FSE-SNM-5030-1.1	
		Perform sales activities for assigned clients or accounts following a standard process, and execute day-to-day administrative activities for sales	Engage with customers, providing solutions, gathering feedback and managing customer satisfaction for a given account	Develop plans and processes to cater to various customer accounts, manage customer satisfaction and address current and projected customer needs	Establish organisational direction in managing customer accounts, and develop an account management framework and customer service strategy to engage, retain and grow customers	
Knowledge		<ul style="list-style-type: none"> Features of products or services versus competitors' offerings Steps in the sales process Protocol for handling sales documents and administrative activities 	<ul style="list-style-type: none"> Usage of communication platforms for customer interaction Measures and indicators of customer satisfaction Suite of product and service solutions Tools to track sales performance for each account 	<ul style="list-style-type: none"> Variation in different customer and client needs and operating environment Suitability and customisation options of various product and service solutions Methods of measuring customer satisfaction Organisational approach to customer service and relationship management Strategies to increase sales through existing or new clients Product sales cycles, client profiles and product performance trends Effective negotiation techniques Techniques to assess business impact of account management activities 	<ul style="list-style-type: none"> Organisation-wide sales strategy Overarching business direction Organisational strategies in account management Best practices and new strategies in customer service Trends and evolution of customer needs and demands Enterprise-level sales monitoring and management tools and dashboards Client relationship building techniques 	

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<p>Abilities</p>		<ul style="list-style-type: none"> • Articulate advantages and disadvantages of the organisation's product or service offerings to customers • Share basic understanding of the organisation's products and services with customers • Conduct sales activities for assigned clients or accounts according to a defined sales plan • Sell a limited range of products and services to specific assigned customers, following a standard protocol • Execute day-to-day administrative activities for sales, including handling and management of sales contracts, systems, transactions, and documentation 	<ul style="list-style-type: none"> • Utilise suitable communication platforms to engage with customers • Process feedback from customers on organisation's products and services • Interact effectively with customer and provide quality customer service • Manage customer satisfaction • Provide suitable product and service solutions to address customer needs • Drive sales and servicing activities for existing clients or accounts • Retain accountability for sales performance for one or a few small customer accounts 	<ul style="list-style-type: none"> • Formulate an action plan to cater to various customer accounts • Establish existing and potential customer needs and expectations based on feedback • Customise a customer service plan to cater to specific needs of different customers and clients • Adapt proposed solutions as well as sales messages to suit the customer's business context needs • Devise strategies to broaden or deepen relationships with existing customers • Develop product and service solutions that will address current and future customer needs • Set up processes to measure and manage customer satisfaction in line with key performance indicators • Oversee sales performance of a set of customer accounts • Assess business impact of account management activities 	<ul style="list-style-type: none"> • Develop organisational objectives and key performance indicators in managing customer accounts • Establish a customer account management framework to evaluate and enhance customer satisfaction • Develop an organisational customer service strategy to engage, retain and grow customers • Oversee organisation-wide sales performance through all customer accounts • Lead management of the organisation's largest and most critical customer accounts • Establish long-term, strategic relationships with external partners • Review effectiveness of account management activities across customers, agencies and geographies 	
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