

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

<b>TSC Category</b>	Product, Sales and Market Management					
<b>TSC</b>	Product Performance Management					
<b>TSC Description</b>	Determine effectiveness of financial products through measurement and analysis of data to enable continued performance in meeting intended goals					
<b>TSC Proficiency Description</b>	<b>Level 1</b>	<b>Level 2</b>	<b>Level 3</b>	<b>Level 4</b>	<b>Level 5</b>	<b>Level 6</b>
			<b>FSE-PMN-3016-1.1-1</b>	<b>FSE-PMN-4016-1.1-1</b>	<b>FSE-PMN-5016-1.1-1</b>	<b>FSE-PMN-6016-1.1-1</b>
			Analyse data to determine effectiveness of financial products and financial risks to implement performance improvement initiatives to enable meeting of goals	Resolve financial product performance issues and financial risk management activities to ensure desired outcomes are achieved	Drive performance management evaluation metrics, performance outcomes and corrective actions for financial products	Establish organisational guidelines for financial products performance management systems in line with organisational mission and objectives
<b>Knowledge</b>			<ul style="list-style-type: none"> <li>• Key product performance indicators</li> <li>• Factors affecting financial products performance</li> <li>• Intended financial and non-financial goals for products</li> <li>• Methods to evaluate products performance</li> <li>• Cost-benefit analysis methodologies</li> <li>• Financial analysis methods</li> </ul>	<ul style="list-style-type: none"> <li>• Organisational goals and strategic direction</li> <li>• Products availability in local markets and competitor availabilities</li> <li>• Methods to set products performance indicators</li> <li>• Types of evaluation tools</li> <li>• Gap analysis methodologies</li> <li>• Customer feedback channels</li> <li>• Intended financial and non-financial goals for products</li> <li>• Financial risk assessment methods</li> </ul>	<ul style="list-style-type: none"> <li>• Root cause analysis procedures</li> <li>• Organisation's policies, products and processes</li> <li>• Objectives of products performance management</li> <li>• Range of potential corrective actions to improve performance of products</li> <li>• Intended financial and non-financial goals for products</li> <li>• Financial risk assessment frameworks</li> </ul>	<ul style="list-style-type: none"> <li>• Organisation's vision, mission and values</li> <li>• Industry best practices in products performance systems</li> <li>• Emerging trends in performance management</li> </ul>
<b>Abilities</b>			<ul style="list-style-type: none"> <li>• Monitor performance indicators and feedback of products performance</li> <li>• Perform products offering matching to ensure they meet target customer profile needs</li> </ul>	<ul style="list-style-type: none"> <li>• Determine products performance indicators in line with intended organisational goals</li> <li>• Articulate intended financial and non-financial goals for products</li> </ul>	<ul style="list-style-type: none"> <li>• Endorse products performance indicators and ensure alignment to organisational goals and strategic objectives</li> <li>• Evaluate products performance according to established products performance indicators</li> </ul>	<ul style="list-style-type: none"> <li>• Align products performance evaluation criteria in line with organisational goals</li> <li>• Formulate organisation-led strategies to address gaps in products performance</li> </ul>

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			<ul style="list-style-type: none"> <li>• Identify issues affecting products performance abilities</li> <li>• Support conduct of financial analyses on product</li> <li>• Identify factors driving performance of products</li> <li>• Implement monitoring and evaluation programmes</li> <li>• Analyse results and trends of products performance and identify possible areas of improvement</li> <li>• Perform cost-benefit and risk analyses on products</li> </ul>	<ul style="list-style-type: none"> <li>• Identify assumptions, parameters and thresholds for assessing products</li> <li>• Design performance evaluation criteria and tools</li> <li>• Evaluate products performance based on sales figures and compare to intended financial goals</li> <li>• Build financial models to simulate product performance under various scenarios</li> <li>• Perform financial analyses and financial risk assessment on products</li> <li>• Perform analyses on the gaps identified in products and provide recommendations for improvements</li> <li>• Monitor trends and historical performance of product portfolios</li> <li>• Recommend product performance improvement and financial risk management activities</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluate financial risk assessment findings for impact on product performance</li> <li>• Review and formulate solutions to improve products and corresponding financial performance</li> <li>• Review evaluation criteria and tools</li> <li>• Review issues and root causes that may affect products performance abilities</li> <li>• Review feedback from customers on products, content and experience performance</li> <li>• Review trends and historical data on performance of product portfolios to guide strategy development</li> </ul>	<ul style="list-style-type: none"> <li>• Design financial risk management and risk assessment frameworks for financial products</li> <li>• Devise frameworks to manage products performance</li> <li>• Lead identification and formulation of feedback channels from stakeholders</li> </ul>
<b>Range of Application</b>			<p>Types of Financial Services products may include but are not limited to:</p> <ul style="list-style-type: none"> <li>• Alternatives</li> <li>• Derivatives</li> <li>• Equity</li> <li>• Fixed Income</li> <li>• Private Equity</li> <li>• Foreign Exchange</li> <li>• Futures and Forwards</li> <li>• Trust products</li> </ul>			

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			<ul style="list-style-type: none"> <li>• Wealth Management products</li> <li>• Retail Banking products</li> <li>• Private Banking products</li> <li>• Corporate Banking products</li> <li>• Insurance products</li> <li>• Asset Management products</li> <li>• Financial and Capital Markets products</li> </ul>
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