## Critical Work Functions and Key Tasks / Performance Expectations

**Critical Work Functions**

- **Manage customer segment strategies**
  - Develop and maintain customer segment and market segment strategies based on evolving needs and heterogeneity of target segments
  - Conduct periodic reviews of customer acquisition and communications strategies to ensure continued relevance
  - Manage long-term feasibility of customer value proposition to evolving trends and products within and across segments
  - Align various promotional strategies across various customer segment
  - Leverage and incorporate data findings for customer segment strategy development
  - Deliver key selling points and segment growth activities on the communication channels

- **Maintain segment portfolio health**
  - Establish key performance metrics to monitor performance management of segments against business goals
  - Set the overall direction for new activities to be developed to capture customer's emerging needs
  - Drive the overall marketing strategic initiatives for all segments through appropriate delivery channels
  - Launch marketing programmes and further strengthen partnership relationships to enhance revenue, segment growth and customer experiences

- **Oversee customer journey experiences**
  - Ensure programmes and marketing strategies are tailored to meet all aspects of identified customer journey which can meet customer expectations
  - Lead and enhance the various segment propositions through segment privileges and customer journey experiences
  - Oversee the delivery and quality assurance of initiatives to enhance customer experiences
  - Lead the utilisation of data to understand and monitor customer satisfaction
  - Drive and oversee the initiatives to improve customer experiences across all touchpoints
  - Develop strategies for digitalisation of customer experiences

### Skills and Competencies

<table>
<thead>
<tr>
<th>Technical Skills and Competencies</th>
<th>Generic Skills and Competencies (Top 5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Management</td>
<td>Communication</td>
</tr>
<tr>
<td>Business Environment Analysis</td>
<td>Leadership</td>
</tr>
<tr>
<td>Business Opportunities Development</td>
<td>Interpersonal Skills</td>
</tr>
<tr>
<td>Business Risk Assessment</td>
<td>Decision Making</td>
</tr>
<tr>
<td>Customer Acquisition Management</td>
<td>Developing People</td>
</tr>
<tr>
<td>Customer Behaviour Analysis</td>
<td></td>
</tr>
<tr>
<td>Customer Relationship Management</td>
<td></td>
</tr>
<tr>
<td>Digital Marketing</td>
<td></td>
</tr>
<tr>
<td>Ethical Culture</td>
<td></td>
</tr>
</tbody>
</table>

©SkillsFuture Singapore and The Institute of Banking and Finance
Effective Date: August 2019, Version 1.1
<table>
<thead>
<tr>
<th>Programme Listing</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Market Profiling</td>
<td>Level 5</td>
</tr>
<tr>
<td>Market Research and Analysis</td>
<td>Level 5</td>
</tr>
<tr>
<td>Partnership Management</td>
<td>Level 5</td>
</tr>
<tr>
<td>People Performance Management</td>
<td>Level 5</td>
</tr>
<tr>
<td>Product Advisory</td>
<td>Level 5</td>
</tr>
<tr>
<td>Stakeholder Management</td>
<td>Level 5</td>
</tr>
<tr>
<td>Sales Strategy</td>
<td>Level 4</td>
</tr>
</tbody>
</table>

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.