

Sales and distribution specialist/Coverage officer

Proficiency level

- X New Gen AI skills
- X Transferrable skills at the same proficiency level
- X New skills
- X Transferrable skills at a higher proficiency level¹

Skills Framework track	Sales, after sales, distribution and relationship management	Job function	Sales and marketing
Sub-sectors	Investment banking, asset management	Job family	Sales and distribution
Expected augmentation by Gen AI	<p>Do more and do new: Gen AI can enhance client onboarding and KYC/AML checks, synthesize market research, and generate materials for client presentations. Gen AI tools can also generate tailored insights based on client profiling to curate a customer pitch, which can be directly used by other stakeholders in the FI, such as Relationship Managers, to pitch the relevant products and solutions to clients</p>		

Key tasks that can benefit from Gen AI

Critical work functions	Key tasks
Specific to investment banking, Acquire and manage clients	Manage client information and documentation
	Onboard clients and conduct acceptance, KYC, and AML checks
Acquire and manage clients	Conduct market research, financial analyses, and client presentations
Determine clients' needs	Perform client financial needs analyses
	Conduct client profiling
Recommend solutions to clients	Identify financial solutions for clients
	Propose and pitch financial solutions to clients

New Gen AI skills

Regulatory, legal, and risk management compliance in AI and Gen AI	3
Ethical frameworks for Gen AI	3
Gen AI data governance	3

Additional skills required for potential redesigned role

Role 1: KYC/Customer due diligence analyst (adj. ² Score: 0.36)					
Ethical culture	3	Data governance	3	Service challenges	3
Stakeholder management	3	Regulatory risk assessment	3	Continuous improvement management	3
Customer acceptance checking and onboarding	2	Account management	3	Regulatory compliance	3
Customer relationship management	3	Taxonomy application	3		
Role 2: Product marketing manager (adj. Score: 0.28)					
Ethical culture	4	People performance management	4	Market profiling	4
Networking	4	Market research and analysis	4	Product marketing and branding	4
Stakeholder management	4	Business risk assessment	4	Digital marketing	4
Sales strategy	4	Product performance management	4	Business environment analysis	4
Sustainable lending instruments structuring	3	Customer behavior analysis	4	Strategy planning	4
Budgeting	3	Demand and supply analysis	4	Innovation management	4

1. Transferrable skills with an increase in one level of proficiency is considered easier to acquire than transferable skills with multiple levels of increase in proficiency, followed by net new additional skills. Depending on job redesign for the financial institution, the financial institution will have to pick select skills to reskill employees on, via a combination of on-the-job training and existing courses.

2. Skills adjacency score.

Source: SkillsFuture Skills Framework

DO MORE AND DO NEW