

Head of sales and distribution/Head of coverage

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	Job family	Sales and distribution
Sub-sectors	Investment banking, asset management	Expected augmentation by Gen AI	Do more: Gen AI can enhance client information and documentation processes for accuracy and efficiency, and augment KYC and AML checks. Gen AI tools can also support market research initiatives by synthesizing large datasets, identifying new markets, and facilitating idea generation to encourage innovation in the financial solutions offered to clients		

Key tasks that can benefit from Gen AI

Critical work functions	Key tasks
(Specific to Investment Banking) Acquire and manage clients	Develop client information and documentation processes to ensure accuracy and efficiency Ensure client onboarding and acceptance checks, including KYC and AML adhere to organizational and regulatory guidelines
Acquire and manage clients	Lead market research initiatives to improve financial analysis and promote enhanced client presentation capabilities Drive identification of new markets for client acquisition and prioritize markets based on the organization's strategies
(Specific to Asset Management) Acquire and manage clients	Define organization strategies for building relationships and networks to secure Requests for Proposal (RFPs) and strengthen the distribution network
Manage sales team performance targets	Provide feedback, coaching, and mentoring to team members
Determine clients' needs	Formulate strategies for team members to perform client financial needs analysis in alignment with industry standards Oversee client pipelines based on their profiles
Recommend solutions to clients	Establish best practices for proposal development and pitches to clients Drive innovation within the team to identify financial solutions for clients that are differentiated from competitors Spearhead initiatives for collaboration across business units to identify the best financial solutions for clients

New Gen AI skills

Gen AI strategy	5	Gen AI innovation, R&D, and innovation management	5	Prompt design	3
Leading Gen AI-enabled transformations	5	Ethical frameworks for Gen AI	5	Gen AI principles and applications	3
Gen AI data governance	5	Regulatory, legal, and risk management compliance in AI and Gen AI	5		

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.

Source: SkillsFuture Skills Framework