

SKILLS FRAMEWORK FOR FINANCIAL SERVICES			
SKILLS MAP- RELATIONSHIP MANAGEMENT DIRECTOR - CORPORATE AND LARGE MULTI-NATIONAL COMPANIES			
Sector	Financial Services		
Track	Sales, After Sales, Distribution and Relationship Management		
Occupation	Relationship Manager		
Job Role	Relationship Management Director - Corporate and Large Multi-National Companies		
Job Role Description	The Relationship Management Director - Corporate and Large Multi-National Companies is responsible for managing long lasting relationships with clients and establishing policies and practices to aid his team in achieving their targets on new client acquisition. He/She drives continuous initiatives to help his team provide enhanced advice, recommendation on products, services and solutions to clients. He is responsible for credit analysis activities but also for overseeing how his team conducts these activities. He helps to set guidelines and collaborate with other business units on complex or difficult credit review cases that have been escalated for completion. As a leader, he is also involved with team management, evaluation and determining Key Performance Indicators (KPIs) for his team members.		
	The Relationship Management Director - Corporate and Large Multi-National Companies possesses deep business, market and industry knowledge. He always looks for opportunities to foster connectivity and partnerships with internal and external stakeholders. He keeps updated on legal, risk, compliance and regulatory policies and changes to ensure that he disseminates information to his team members. He is innovative in both creating bespoke products, services and solutions for clients and resolving their financing issues. He understands different global and cultural contexts and how they will effect business strategies.		
Critical Work Functions and Key Tasks / Performance Expectations	Critical Work Functions	Key Tasks	Performance Expectations (For legislated / regulated occupations)
	Acquire and manage clients	Define narrowed focus areas for market segmentation strategies and prioritise industries and/or sub-segments for organisational growth and development	If role is scoped to provide advice directly to customers on investment strategies that cover dealings in securities, futures, collective investment schemes, REITs, funds and/or capital markets, Capital Markets and Financial Advisory Services (CMFAS) certification is required. Relevant modules include but are not limited to: 1A, 1B, 2A, 3, 4A, 4B, 5, 6, 6A, 8, 8A, 10
		Strategise opportunities for the organisation to develop and maintain relationships with clients to enhance the value of services provided	
		Establish frameworks for responses to client queries relating to credit, deposits, products and operations issues	
		Keep abreast of global standards for due diligence and evaluate impact on the organisation	
		Drive innovation of customised on-boarding options and solutions for clients to suit their individual needs	
	Advise clients on recommended products, services and solutions	Strategise opportunities for team members to gain deeper understanding of clients' customised business needs	
		Foster collaboration between business units to generate bespoke advice, ideas and solutions for clients	
		Lead the team in determining strategies to increase cross-selling of products and services to help achieve clients' financial objectives	
		Spearhead initiatives for development of team members' in-depth knowledge of sophisticated global markets, products, services and solutions	
		Oversee development of marketing and structuring customised products including evaluation of solutions created by team members	
		Prioritise identification of product partners to match client needs with relevant expertise	
		Oversee and set targets for corporate portfolios for team members to achieve maximum revenues	
	Provide ongoing credit analysis and support	Plan and operationalise credit analysis processes for large corporate clients	
		Establish organisation standards for credit proposals and review credit presentations	
		Monitor teams' ongoing credit reviews to ensure that risk assets portfolio is managed in alignment with organisational thresholds	
		Set frameworks to monitor credit facilities to minimise operational, credit and fraud risk	
Synergise with credit operations and risk business units to achieve viable financing solutions for clients			
Manage team's performance targets	Set activities and revenue targets for teams		
	Design Key Performance Indicators (KPIs) using a balanced scorecard approach		
	Provide feedback, coaching and mentoring for team members		
	Attract and retain talent to strengthen the capabilities of the team		
	Provide guidance to teams to improve the depth of knowledge and level of sophistication necessary to actively engage with clients		
	Ensure team members are trained and in compliance with internal and external regulatory requirements		

	Technical Skills and Competencies		Generic Skills and Competencies (Top 5)	
	Skills and Competencies	Account Management	Level 5	Leadership
Business Environment Analysis		Level 6	Resource Management	Advanced
Business Negotiation		Level 6	Transdisciplinary Thinking	Advanced
Business Opportunities Development		Level 6	Developing People	Advanced
Client Investment Suitability		Level 5	Global Mindset	Advanced
Credit Assessment		Level 4		
Customer Acceptance Checking and Onboarding		Level 4		
Customer Acquisition Management		Level 5		
Customer Experience Management		Level 5		
Ethical Culture		Level 5		
People Performance Management		Level 5		
Product Advisory		Level 5		
Regulatory Compliance		Level 5		
Risk Management		Level 4		
Sales Strategy		Level 6		
Stakeholder Management	Level 6			
Programme Listing	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.