SKILLS FRAMEWORK FOR FINANCIAL SERVICES
SKILLS MAP- RELATIONSHIP MANAGER - CORPORATE AND LARGE MULTI-NATIONAL COMPANIES

Sector	Financial Services
Track	Sales, After Sales, Distribution and Relationship Management
Occupation	Relationship Manager
Job Role	**Relationship Manager - Corporate and Large Multi-National Companies**
Job Role Description	The Relationship Manager - Corporate and Large Multi-National Companies is responsible for active client management strategies and acquisition through networking, marketing activities and ongoing dialogue with a few key selected clients. He is focused on building strategic relationships with these select companies. He/She provides product advisory on bespoke products that meet clients' needs. He is the main point-of-contact for all client relationship matters. He also conducts credit analysis and monitors his clients to proactively manage any potential risks or issues. The Relationship Manager - Corporate and Large Multi-National Companies possesses decorum in all his interactions with internal and external stakeholders. He is a team player and takes responsibility for his actions and can be held accountable to meet timelines. He is able to network and build connections to drive new business opportunities. He possesses poise and maturity in handling difficult client situations. He is driven and motivated to provide the best service possible to his clients. He is resourceful and results-oriented. He understands the intricacies of working with large global clients and is able to adjust communications and strategies to meet client expectations.

Critical Work Functions and Key Tasks / Performance Expectations

Critical Work Functions	Key Tasks	Performance Expectations (For legislated / regulated occupations)
Acquire and manage clients	Identify and prospect clients through market segmentation with a focus on an industry and/or sub-segment applying a narrowed focus to client acquisition	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
	Develop and maintain relationships with clients to provide quality services	
	Respond to client queries relating to credit, deposits, products and operational issues	
	Articulate local and regional standards pertaining to due diligence and articulate complexities of global actions	
	Develop customised on-boarding options and solutions for clients to suit their individualised needs	
Advise clients on recommended products, services and solutions	Demonstrate an understanding of clients' customised business needs	
	Generate bespoke advice, ideas and solutions for clients	
	Cross-sell customised products and services with the objective of meeting clients' unique needs to achieve financial objectives	
	Develop in-depth knowledge of sophisticated global markets, products, services and solutions	
	Develop extensive experience of marketing and structuring customised products	
	Collaborate with product partners to identify and match clients' needs with relevant expertise	
	Manage assigned corporate portfolio to ensure portfolio revenues are maximised	
Provide ongoing credit analysis and support	Perform credit analysis for large corporate clients	
	Develop credit proposals addressing relevant risk factors and submit credit presentations for approval	
	Perform ongoing credit reviews to ensure that risk assets portfolio is appropriately managed	
	Review and monitor credit facilities to minimise operational, credit and fraud risk	
	Identify credit related issues and create viable financing solutions for clients	

Technical Skills and Competencies		Generic Skills and Competencies (Top 5)	
Account Management	Level 4	Service Orientation	Advanced
Business Environment Analysis	Level 5	Problem Solving	Advanced
Business Negotiation	Level 5	Communication	Advanced
Business Opportunities Development	Level 5	Global Mindset	Advanced
Client Investment Suitability	Level 4	Decision Making	Advanced
Credit Assessment	Level 3		

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Skills and Competencies	Customer Acceptance Checking and Onboarding	Level 3		
	Customer Acquisition Management	Level 4		
	Customer Experience Management	Level 4		
	Ethical Culture	Level 4		
	Product Advisory	Level 4		
	Regulatory Compliance	Level 4		
	Risk Management	Level 3		
	Sales Strategy	Level 5		
	Stakeholder Management	Level 5		
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.