

## **JOB DESCRIPTION**

### **SECTION 1**

#### **BASIC DATA**

**Name:**

**Job Title:** Relationship Manager - Trade Finance

**Reports to:** Relationship Director

**Job Location:** Canterbury / London

**Job Family:** Team Leader and Specialist

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### **SECTION 2**

#### **Department structure**

Please see Appendix A attached.

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### **SECTION 3**

#### **OVERALL JOB PURPOSE**

Supporting the relationship directors to develop, promote and widen the take-up of The London Institute of Banking & Finance's international trade and transaction banking qualifications currently CDCS/CSDG/CITF/CSCF/CTFC/CertPAY both within the UK and overseas.

The Jobholder will also have a portfolio of UK and international relationships to manage and develop.

As both a support and client-facing role it requires working with many other teams within The London Institute of Banking & Finance to ensure delivery of customer requirements.

#### **SIZE/DIMENSIONS**

Not responsible for any direct reports.

Revenue targets to be achieved in line with The London Institute of Banking & Finance Strategic Plan

**SECTION 4**

**PRINCIPAL ACTIVITIES/OUTPUT OF JOB**

1. Support the development and implementation of strategies to promote trade and transaction banking qualifications globally to partners, banks and exporters under the direction of the Relationship Director to build revenue streams and working to agreed targets.
2. Manage and develop relationships with a portfolio of UK based Global Trade Finance Banks, ICC National Committees and other partners as agreed with the Relationship Director
3. Respond to the on-going questions and issues raised by students, corporates and our partners, in relation to LIBF’s portfolio of trade and transaction banking qualifications.
4. Assist Finance in the non-payment of fees due from corporates.
5. Maintain accurate and complete client and prospect records, including the maintenance of our database of contacts
6. Assist in the on-going maintenance of our portfolio of qualifications, which includes attendance at Assessment Board Reviews of each qualification and supporting the Qualification Development Team on relevant action points.
7. Undertake research and data analysis as required to support Relationship directors
8. Assist in the development of the marketing strategy for each qualification and work closely with Marketing to ensure implementation
9. Assist in the co-ordination of conferences, workshops and webinars
10. Through all interactions contribute to the development of a strong brand identity reflecting The London Institute of Banking & Finance values and strengths.
11. Any other duties that may reasonably be required.

**CONTACTS AND INFLUENCE EXERCISED**

This is a role with some influence in terms of positioning The London Institute of Banking & Finance with corporate customers and partners both in the UK and internationally. Considerable liaison will be required with external bodies such as the International Chamber of Commerce (ICC) and overseas banking associations. A proven track record of relationship management will need to be displayed together with a good knowledge of transaction banking – trade finance and payments - procedures and practices.

External contacts will be with personnel at all levels within business lines, the learning and development teams and Training & Competence teams within financial services organisations. In addition there will be contact with trainers, tutors and students at all levels.

Internal contacts at all levels working closely with the key service providers within The London Institute of Banking & Finance to ensure customer satisfaction is achieved.

**DECISIONS**

Indicate the level which best describes the jobholder’s involvement in the decision making process:

Follows written and verbal instructions and established guidelines	
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Interprets policies & procedures	
Participates in the establishment of guidelines & procedures	<b>X</b>
Acts as final authority to implement policy, guidelines and procedures that affect strategic goals	

Indicate the statement which best describes the impact of the job holder's decisions:

Restricted to employee's own work	<b>X</b>
Has impact on department/directorate* objectives	
Has impact on The London Institute of Banking & Finance objectives	

**Examples of the decisions that are generally made by the jobholder:**

Examples of the decisions that are generally made by the job holder:

The post-holder is expected to be able to win approval for securing and gaining international professional qualifications from corporates and associations.

**DEFINITION /CLARITY**

The post-holder should be prepared to work flexibly and on occasion extended hours, with some time away from their office base, including overnight trips to UK based relationships

**PERSON SPECIFICATION**

**Job Title:** Relationship Manager - Trade Finance

**Reports to:** Relationship Director – International Trade

**Department:** Relationship Management

<b>Qualifications, knowledge and professional memberships</b>	<b>Essential/desirable?</b>
Good understanding of the broad spectrum of financial services provision.	E
Good understanding of the Regulatory sector of the industry.	D
Good understanding of the HE and executive education sectors.	D
Good understanding and proven track record of corporate relationship building and business development.	E
An understanding of the issues underpinning corporate/student acquisition and retention.	D/E
Ability to understand and work within the framework and quality standards set by academic partners and academic regulators (QCA and QAA)	E

<b>Technical competencies (skills and experience)</b>	<b>Essential/desirable?</b>
Proven and demonstrable experience in a business-to-business environment delivering growth and developing business activity.	E
Passion and belief for education and learning.	E
Proven business development and business to business sales skills.	E
Commercially effective – drives revenue production and contributes effectively to the reputation of The London Institute of Banking & Finance.	E
Ability to understand customer needs and priorities and provide quality services through creative problem solving and successful task execution.	E
Experienced territory and call planning activities.	E
Drive, enthusiasm, initiative and a strong professional presence.	E
Resilience and tenacity – whilst part of a team the role holder will often be working on their own in client/prospect premises.	E
Empathy – the ability to put oneself in the shoes of the prospect/client	E

<b>Core Competencies</b> (this section should contain the level of competency required to carry out this role. Please refer to the competency framework for clarification where needed. Placing a N/A where the competency is not required as part of the job)	<b>Essential / desirable?</b>	<b>Step</b>
<b>Values</b>		
Listening and Learning	E	2-2
Innovation	D	3

Support	E	1
Transparency	E	1
Collaboration	E	2
<b>Skills and Experience</b>		
Business thinking	E	2
Getting things done to achieve results	E	2/3
Customer Experience	E	2/3
Managing quality standards	E	2
Applying judgement and taking decisions	D	3
Managing individuals and teams (line managers only)		

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Signed: Job Holder

Date

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Signed: Line Manager

Date

## Appendix A

CPD Manager  
Sue Wiggins

