

JOB DESCRIPTION

SECTION 1

BASIC DATA

Job Holder's Name:		Job Title:	Financial Capability Relationship Manager – North West/North of England
Reports to:	Head of Financial Capability	Location:	Home based
Department:	Financial Capability and Community Outreach	Job Family:	Sales

SECTION 2

DEPARTMENT STRUCTURE

Please see Appendix A attached.

SECTION 3

OVERALL JOB PURPOSE

(What is the purpose of the job?)

This Relationship Manager post is focussed on the North West/North Region of the UK; the appointed post holder must live within this area. They will develop strong and lasting relationships with schools, colleges and other associated delivers of education is central to this role. This will be achieved by ensuring educators have the support needed to deliver our qualifications confidently and they are well informed about The London Institute of Banking & Finance and the importance of financial education.

The role requires an ambitious, driven colleague whom will also develop new business opportunities alongside the support given to existing centres. It also requires the ability to manage ones own time and flexibility ensuring that the needs and development of the business are carried out effectively.

SIZE/DIMENSIONS

(In what context does this role operate in terms of area of impact, financial budgets and supervision and or management of staff.)

No budget authority and spending restricted to acceptable expenses relating to the role.

SECTION 4

PRINCIPAL ACTIVITIES/OUTPUT OF JOB

(This area outlines in more detail the duties of the post holder).

- ❖ To sell The London Institute of Banking & Finance educational solutions and products to schools, the FE sector and other identified educators;
- ❖ To carry out an agreed number of appointments per calendar month;
- ❖ To provide The London Institute of Banking & Finance with market intelligence about developments in the market and possible opportunities;

- ❖ Be aware of external issues affecting schools and their ability to deliver our qualifications and take appropriate action.
- ❖ To attend appropriate conferences/ trade shows/ exhibitions as a representative of The London Institute of Banking & Finance.
- ❖ To develop existing contacts and identify new potential sources of business; working towards agreed revenue targets and retention of centres within regional area
- ❖ To coordinate and deliver targeted marketing campaigns for regional areas; to include self-generated campaigns and whole organisational activities
- ❖ To produce detailed business plans when requested and be held accountable for development of regional area / assigned centres
- ❖ To lead on additional areas of responsibility as agreed with MD of FC (e.g. careers development, links with wider organisations – these are examples not necessarily the agreed areas)
- ❖ To manage own time effectively and productively to ensure that business development opportunities are maximised demonstrating flexibility in approach
- ❖ To approach the role with vigour, enthusiasm and professionalism, to ensure centres are well supported and continue to deliver LIBF qualifications
- ❖ To make presentations to organisations and to potential students

CONTACTS AND INFLUENCE EXERCISED

(Type, number and seniority of contacts, impact of influence)

Contacts range from teachers, Head teachers, College Principals and financial services sector. The impact of their influence will be the deciding factor in schools and colleges taking up our qualifications.

- ❖ External contact with the teaching and academic professors;
- ❖ To work with local academic partners to promote The London Institute of Banking & Finance registrations and student retention;
- ❖ To work in partnership with other agents of The London Institute of Banking & Finance to promote our range of academic solutions;
- ❖ To work closely with the key service providers within The London Institute of Banking & Finance to ensure customer satisfaction is achieved;
- ❖ To apply the values of The London Institute of Banking & Finance.

DECISIONS

(How much freedom is there to provide solutions, and make decisions regarding the resolution of problems within the constraints of established guidelines or procedures, and supervision?)

- ❖ To operate within determined parameters from time availability;
- ❖ To freely make day-to-day decisions within own authority and understanding of The London Institute of Banking & Finance qualifications and solutions

Indicate the level which best describes the job holder's involvement in the decision making process:

Follows written and verbal instructions and established guidelines	X
Interprets policies & procedures	
Participates in the establishment of guidelines & procedures	
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	X
Has impact on department/directorate* objectives	
Has impact on The London Institute of Banking & Finance / Proshare objectives	

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

(To be added by line manager/employee)

- Identify appropriate schools and organisations to contact to promote the financial capability qualifications.
- Contact strategy for development of new business and retention of existing relationships.
- Prioritise workload to ensure good customer service.

DEFINITION /CLARITY

(The extent to which to job is defined; the clarity of the job's boundaries, levels of uncertainty)

The role is clearly defined and does involve working collaboratively with the other CRM's, Marketing and Operations.

ANY ADDITIONAL FEATURES OF NOTE

A crucial role in the development, delivery and retention of organisations offering our FC qualifications.

PERSON SPECIFICATION

Job Title: Financial Capability Relationship Manager
Reports to: Head of Financial Capability
Department: Financial Capability and Community Outreach

Qualifications, knowledge and professional memberships	Essential / desirable?	
Knowledge of Education system	E	
Proven track record in sales (5 years+)	E	
Knowledge of the Financial Services Sector	D	
Technical competencies (skills and experience)	Essential / desirable?	
IT Skills – Outlook, Power Point, Excel (intermediate) and SAGE	E	
Teaching experience	E	
Time management	E	
Good communication skills	E	
Presentation creation and delivery skills	E	
Motivated and able to make use of own initiative	E	
Emotionally intelligent and able to reflect and adapt	E	
Flexible and adaptable	E	
Core Competencies (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)	Essential / desirable?	Step
Values		
Listening and Learning	E	2-2
Innovation	E	2
Support	E	1
Transparency	E	1
Collaboration	E	2
Skills and Experience		
Business thinking	E	2
Getting things done to achieve results	E	1
Customer Experience	E	2
Managing quality standards	E	2
Applying judgement and taking decisions	E	2
Managing individuals and teams (line managers only)	N/A	N/A

Signed
 JOB HOLDER

Date

Signed
 LINE MANAGER

Date

Appendix A

