



<b>Job title</b>	Relationship Manager, Associates
<b>Level</b>	Manager

### About UK Finance

UK Finance is a trade association representing nearly 300 of the leading firms providing finance, banking, markets and payments-related services in or from the UK. UK Finance has been created by combining most of the activities of the Asset Based Finance Association, the British Bankers' Association, the Council of Mortgage Lenders, Financial Fraud Action UK, Payments UK and the UK Cards Association.

Our members are large and small, national and regional, domestic and international, corporate and mutual, retail and wholesale, physical and virtual, banks and non-banks. Our members' customers are individuals, corporates, charities, clubs, associations and government bodies, based in the UK and overseas, served domestically and cross-border. These customers access a wide range of financial and advisory products and services, essential to their day-to-day activities, from our members. The interests of our members' customers are at the heart of our work.

UK Finance is the UK representative on a number of international trade associations including the European Banking Federation, the European Cards Payments Association, the European Payments Council and the International Banking Federation.

The role of UK Finance is to help our members ensure that the UK retains its position as a global leader in financial services.

### Job purpose

The Relationship Manager's key objectives are to:

- Through relationship building and regular engagement with a portfolio of existing associate members, implement the UK Finance membership proposition to achieve high levels of member engagement as aligned to business and commercial objectives.
- In collaboration with the UK Finance management team, develop a membership account management strategy which fulfils existing members' needs, broadens the scope of relationship with associate members, and profitably increases the associate member and events business streams. This will include, although not be restricted to:
  - The origination, implementation and management of targeted roundtable events, dinners, webinars and reports.

- Working in collaboration with UK Finance commercial, events and training Directors capitalise on new engagement opportunities which will enhance the UK Finance brand throughout the financial sector.
- In collaboration with the UK Finance commercial management team, implement and manage an engagement programme which delivers a structured and effective approach to interacting with and securing new associate members.
- Support the wider UK Finance membership offering, including regional visits and meetings.

## **Duties and responsibilities**

- Develop the UK Finance associate membership proposition:
  - Work with UK Finance commercial management team to engage the Associate base on topical events.
- Relationship Management Strategy:
  - Work with the Commercial Director to develop, execute and refresh a relationship management strategy and approach relating to both Associate and full membership.
- Relationship Management:
  - Build and manage relationships with Associate members to cement their membership and seek to profitably add value.
  - Represent UK Finance at events as required.
- Growing and delivering value to the UK Finance Associate membership base:
  - Establish and build a network of relationships with Associate Member firms and individuals to broaden and deepen the network of relationships and increase the overall membership base
  - Work with the UK Finance management team to develop and implement an approach to analyse and segment the membership base to better understand members' priorities, needs and interests.
  - Provide intelligence on associate member needs and priorities which can be reflected in new events i.e. roundtables, forums, working group meetings, research, reports, and the marketing communications strategy.
  - Working with the UK Finance commercial management team to ensure the membership proposition is current and attractive by using business-wide intelligence to tailor the membership proposition, so as to increase its relevance to membership sub-sectors.
- New Business:
  - Supporting the achievement of new business targets set out in the business strategy and as agreed with the UK Finance Management Team.
- CRM / Contact management:
  - Work with the UK Finance commercial management team and other key internal stakeholders to establish a CRM approach and contact database/system to assist in managing the key Associate contact base.

## **Skills and competencies**

- Expertise in commercial and business development a pre-requisite. This is a high profile role for UK Finance working within senior levels of the Associate and full member market place and related financial services sector.
- Expertise in relationship management principles and practice.

- Sound knowledge of customer segmentation analysis methods.
- Deep experience in building and maintaining relationships with senior industry individuals:
  - Experience of account management and establishing an account management structure.
  - Familiarity with membership organisations.

### **Personal Attributes**

- Excellent command of written and spoken English
- Proactive
- Conscientious with strong attention to detail
- Excellent time management
- Ability to get on with people at all levels
- Outgoing
- Resilient

### **Qualifications and required experience**

- Degree or equivalent desirable

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