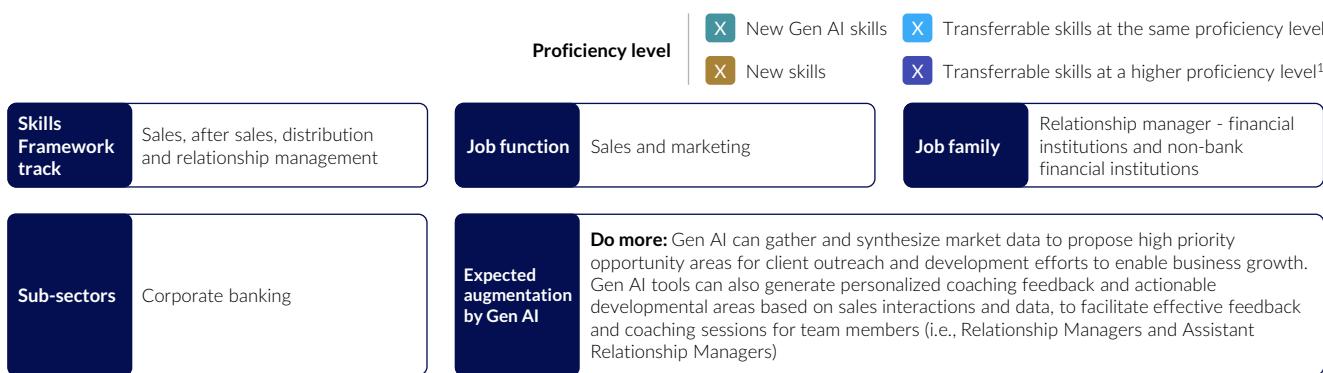


Relationship management director – Financial institutions and non-bank financial institutions



Key tasks that can benefit from Gen AI

Critical work functions	Key tasks
Acquire and manage clients	<p>Keep abreast of changing regulations as they pertain to different lending types and changing requirements from various sovereigns and ensure knowledge is transferred to team members</p> <p>Strategize opportunities for the organization to develop and maintain relationships with clients to enhance the value of services provided</p> <p>Provide oversight on team member alignment with compliance KYC documentation and AML policies and procedures in order to effectively mitigate and manage risk</p> <p>Drive strategic identification and prospecting of new clients using deep industry knowledge and expertise</p> <p>Establish frameworks for responding to client queries relating to credit, deposits, products, and operational issues</p>
Manage team's performance targets	<p>Provide feedback, coaching, and mentoring to team members</p> <p>Ensure team members are trained and comply with internal and external regulatory requirements</p>
Provide ongoing credit analysis and support	<p>Set frameworks to monitor credit facilities to minimize operational, credit, and fraud risk</p> <p>Review credit analysis criteria for team members to evaluate institutional borrowers</p> <p>Monitor market developments for credit-related management purposes</p> <p>Monitor teams' ongoing credit reviews to ensure the risk assets portfolio aligns with organizational thresholds</p>
Advise clients on recommended products, services and solutions	<p>Develop strategies and frameworks for team members to cross-sell products by leveraging FI relationships and synergies with other business units</p> <p>Prioritize ideas and initiatives to ensure optimal client reach and product exposure for effective operations that optimize delivery to clients and enable the bank to differentiate itself</p> <p>Drive customized strategic plans for clients based on knowledge of client's industry, growth projections, funding strategies, and objectives to differentiate services from competitors</p>

New Gen AI skills

Gen AI strategy	5	Gen AI innovation, R&D, and innovation management	5	Prompt design	3
Leading Gen AI-enabled transformations	5	Ethical frameworks for Gen AI	5	Gen AI principles and applications	3
Gen AI data governance	5	Regulatory, legal, and risk management compliance in AI and Gen AI	5		

1. Transferrable skills with an increase in one level of proficiency is considered easier to acquire than transferable skills with multiple levels of increase in proficiency, followed by net new additional skills. Depending on job redesign for the financial institution, the financial institution will have to pick select skills to reskill employees on, via a combination of on-the-job training and existing courses.

Source: SkillsFuture Skills Framework

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