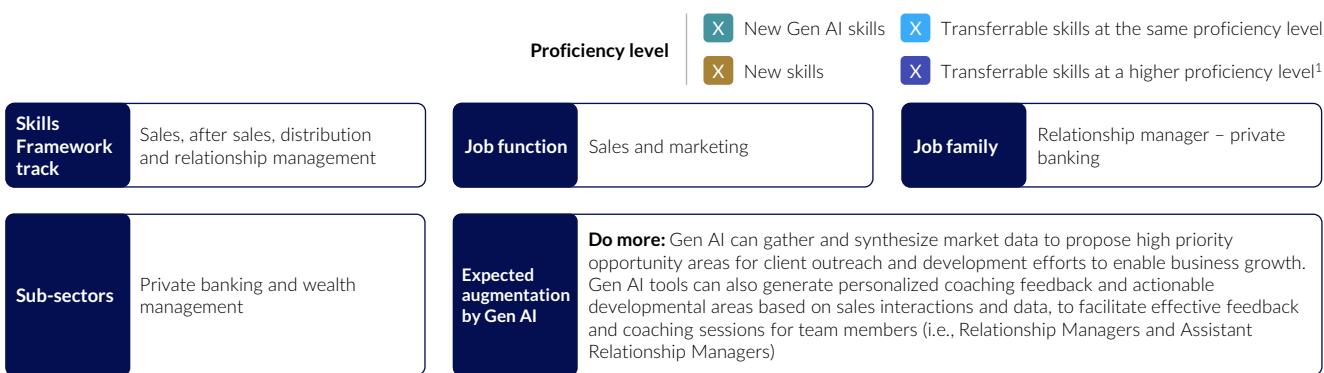


## Relationship management director – Private banking/Team leader



### Key tasks that can benefit from Gen AI

Critical work functions	Key tasks
Manage the customer lifecycle end-to-end	<p>Establish standards for team members to follow when handling escalated banking and financial transactions</p> <p>Oversee client acceptance, KYC, and onboarding procedures, including handling client documents</p> <p>Determine client experience strategies by providing timely information and advice to address their financial needs</p>
Advise customers on products, services, and investment strategies	<p>Determine suitable service offerings that fit clients' and the organization's strategic objectives</p> <p>Establish policies for team members to provide financial advice to clients to meet their needs and objectives</p> <p>Strategize ideas and opportunities to support the team in portfolio analyses and grow client wealth</p> <p>Drive strategies for cross-selling and up-selling of products and services</p> <p>Prioritize organization frameworks to address client needs, risk appetite, and financial objectives</p> <p>Ensure team members are trained and comply with internal and external regulatory requirements</p>
Manage team performance targets	<p>Provide feedback, coaching, and mentoring for team members</p> <p>Ensure team members are trained and comply with internal and external regulatory requirements</p>
Acquire and manage a portfolio of customers	<p>Determine organizational strategies to identify new clients</p> <p>Review credit and operational risk policies to minimize and articulate losses to the team</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