

## Relationship manager – Corporate and large multinational companies (MNCs)

### Proficiency level

- X New Gen AI skills
- X Transferrable skills at the same proficiency level
- X New skills
- X Transferrable skills at a higher proficiency level<sup>1</sup>

<b>Skills Framework track</b>	Sales, after sales, distribution and relationship management	<b>Job function</b>	Sales and marketing	<b>Job family</b>	Relationship manager – corporate and large MNCs
<b>Sub-sectors</b>	Corporate banking, investment banking	<b>Expected augmentation by Gen AI</b>	<b>Do more:</b> Gen AI can assist in drafting client query responses and in credit analysis and reviews. It can also support client prospecting efforts by synthesizing market and client insights to conduct advanced market segmentation, and recommend customized solutions for targeted client acquisition, and bespoke solutions for clients		

### Key tasks that can benefit from Gen AI

Critical work functions	Key tasks
Acquire and manage clients	Articulate local and regional standards pertaining to due diligence and complexities of global actions
	Respond to client queries relating to credit, deposits, products, and operational issues
	Develop and maintain relationships with clients to provide quality services
	Develop customized onboarding options and solutions for clients to suit their needs
	Identify and prospect clients through market segmentation with a focus on an industry and/or sub-segment, applying a narrowed focus to client acquisition
Provide ongoing credit analysis and support	Identify credit-related issues and create viable financing solutions for clients
	Perform credit analyses for large corporate clients
	Develop credit proposals addressing relevant risk factors and submit credit presentations for approval
	Perform ongoing credit reviews to ensure the risk assets portfolio is appropriately managed
	Review and monitor credit facilities to minimize operational, credit, and fraud risk
Advise clients on recommended products, services and solutions	Develop in-depth knowledge of sophisticated global markets, products, services, and solutions
	Collaborate with product partners to identify and match clients' needs with relevant expertise
	Manage assigned corporate portfolios to maximize revenues
	Demonstrate an understanding of clients' unique business needs
	Cross-sell customized products and services with the objective of meeting clients' unique needs to achieve their financial objectives
	Generate bespoke advice, ideas, and solutions for clients

### New Gen AI skills

Prompt design	3
Gen AI principles and applications	3
Ethical and responsible Gen AI adoption	3

### Potential next-seniority level (Relationship management director - Corporate and large MNCs) skills to acquire<sup>1</sup>

Climate change management	4	Product advisory	4	Customer acceptance checking and onboarding	4
Natural capital management	4	Regulatory compliance	5	Customer acquisition management	5
Non-financial-industry sustainability developments	4	Account management	5	Customer experience management	5
Sustainable lending instruments structuring	3	Business negotiation	6	Risk management	4
Ethical culture	5	Business opportunities development	5	Sales strategy	6
Stakeholder management	6	Client investment suitability	4	People performance management	5
Business environment analysis	5	Credit assessment	4		

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