

Relationship manager – Corporate and large multinational companies (MNCs)

Skills Framework track	Sales, after sales, distribution and relationship management	Job function	Sales and marketing	Job family	Relationship manager – corporate and large MNCs
Sub-sectors	Corporate banking, investment banking	Expected augmentation by Gen AI	Do more: 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 acquire¹

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