

## Catholic Development Fund Position Description

<b>Position title</b>	Relationship Manager
<b>Department</b>	Client Services
<b>Reports to</b>	General Manager Client Services
<b>Number of direct reports</b>	Nil
<b>Location</b>	East Melbourne

### Position purpose

Reporting to the General Manager Client Services, Melbourne, the Relationship Manager is accountable for providing high quality and accessible loan, investment and transaction services and products to the CDF's existing and perspective clients.

The Relationship Manager is responsible for supporting their Account Executive with client focused training and education as well as lending processes.

### Position responsibilities

- Cultivate strong direct relationships with all clients to achieve a high Net Promoter Score (NPS);
- Support the Executive Manager Operations in achieving the strategic plan and growth objective.
- Identify, establish and develop new client relationships across Parishes and Parish Schools.
- Utilise CRM software to ensure all relevant client interactions are recorded for future reference.
- Gather information on client's financial situation and needs to facilitate the loan application process and to identify clients in financial stress.
- Assist and facilitate the rollout of new products.
- Maintain current knowledge of products and services offered by competitors.
- Complete loan applications and Client Risk Analysis papers for new loan applications.
- Develop a high level of awareness of trends and issues concerning client sectors: parishes, schools, health and welfare.
- Represent the CDF through public speaking and promotions, as well as attending openings of Catholic projects.
- Produce and report on monthly activities to the Executive Manager and forecast borrowing needs.
- Assist in the development of new products to fulfil client needs.
- Work collaboratively with the Operations team & Executive Manager Operations.
- Provide mentoring & guidance to Account Executives on the loan application process.

Position requirements	
Key Competencies	<ul style="list-style-type: none"> <li>• Analysing – Gaining insight into cause and effect relationships by assessing the available information in a critical and rational manner and by differentiating the essential from the incidental.</li> <li>• Problem Solving – Responding to and controlling unexpected situations by evaluating possible solutions based on experience and knowledge and by taking the initiative to implement the best solution.</li> <li>• Guiding People – Ensuring that everyone behaves appropriately by giving clear instructions, monitoring results and taking corrective measures in accordance with the objectives and the available means.</li> <li>• Influencing – Reaching goals by making a good impression, getting others to accept ideas by using convincing arguments, creating win-win situations and responding efficiently to one's discussion partners or audience.</li> <li>• Advising – Giving targeted advice to others within or outside of the organisation and establishing trusting relationships based on one's own credibility and expertise.</li> <li>• Adopting a Customer-Oriented Attitude – Guiding clients by giving targeted advice in their decision process. Always putting clients first by providing a personal service and by maintaining constructive contacts.</li> <li>• Achieving Objectives – Generating results by assuming responsibility for one's performance and the correctness of one's interventions, recognising opportunities and acting efficiently, at the appropriate moment and within the given deadlines.</li> <li>• Engaging – Fully dedicating oneself to one's work by always giving the best of oneself and by striving for quality. Showing perseverance even when confronted with frustration, opposition, pressure or the need for attention to detail.</li> </ul>
Education/qualification	<p>Essential</p> <ol style="list-style-type: none"> <li>1. Relevant undergraduate and postgraduate qualifications in commerce;</li> <li>2. Previous experience in a financial institution;</li> <li>3. Previous experience in relationship management roles;</li> <li>4. Well developed analytical and reporting skills</li> </ol> <p>Desirable</p> <ol style="list-style-type: none"> <li>1. Previous experience in a Catholic Church organisation</li> <li>2. Proven leadership skills and management experience;</li> </ol>
Key Stakeholders	<p>Internal</p> <ul style="list-style-type: none"> <li>• CDF Finance, Risk and Treasury teams</li> <li>• CEO and Executive Team</li> </ul> <p>External</p> <ul style="list-style-type: none"> <li>• Investors and borrowers – Parishes, schools, congregations, welfare organisations.</li> <li>• Prospective clients.</li> </ul>

	<ul style="list-style-type: none"><li>• Management and staff of Melbourne Archdiocese Catholic Schools, Catholic Education Office WA. Catholic Education Office Sale.</li><li>• Transaction bank (NAB)</li><li>• Management and staff Archdiocese or Melbourne, Diocese of Bunbury and Diocese of Sale (Owners)</li></ul>
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### CDF's employee values

**Values** – CDF is practically tasked with the provision of capital to Catholic organisations to support their growth and it does so consistent with the mandate above. The manner in which CDF seeks to undertake its work is also guided by scripture. The following scripture have been identified as particularly relevant:

- Care for others – *'I give you a new commandment: love one another; you must love one another just as I have loved you. It is by your love for one another, that everyone will recognise you as my disciples.'* John 13:34-35
- The importance of wealth – *'Do not lay up for yourselves treasures on earth, where moth and rust destroy and where thieves break in and steal, but lay up yourselves treasures in heaven, where neither moth nor rust destroys and where thieves do not break in and steal. For where your treasure is, there your heart will be also.'* Matt 6:19-21
- Sharing wealth – *'And the crowds asked him, "What then shall we do? And he answered them, "Whoever has two tunics is to share with him who has none, and whoever has food is to do likewise."* Luke 3:10-11  
*'Jesus looked up and saw the rich putting their gifts into the offering box, and he saw as poor widow put in two small copper coins. And he said "Truly, I tell you, the poor widow has put in more than all of them. For they all contributed out of their abundance, but she out of her poverty put in all she had to live on".'* Luke 21:1-4