

**JOB DESCRIPTION**

<b>Job Title:</b>	Manager, Workplace Banking	<b>Reports to:</b>	Head, Branch Business
<b>Unit:</b>	Branch Business	<b>Department:</b>	Retail Banking
<b>Grade:</b>		<b>Date:</b>	
<b>Job holder:</b>		<b>Supervisor:</b>	
<b>Signature:</b>		<b>Signature:</b>	

**Job Purpose Statement**

To deliver profitable business growth targets of Retail Banking Products and services to a defined market segment through the workplace banking and Mortgage value proposition. This entails creation of opportunities for bulk business by signing up companies especially those with a corporate relationship with NCBA Bank.

This incorporates strong personal drive in prospecting and acquiring new workplace banking scheme companies, pursuing incremental business within the existing portfolio, managing customer expectations to sustain business relationship and providing business advice that will benefit the client.

**Key Accountabilities (Duties and Responsibilities)**

<b>Perspective</b>	<b>% Weighting</b> <i>(to add up to 100%)</i>	<b>Output</b>
<b>Financial</b>	70%	<ul style="list-style-type: none"> <li>• Growth in business volumes (deposits and loans/advances), customers and customer accounts (30%)</li> <li>• Establish new Retail banking business relationships with Corporate, SME &amp; Institutional Banking customers (20%)</li> <li>• Management of scheme customer expectations and relationships (10%)</li> <li>• Ensure 100% participation in product promotional activities, customer events and scheduled product clinics (10%)</li> </ul>
<b>Internal business processes</b>	10%	<ul style="list-style-type: none"> <li>• Minimization of exposures to and impact of risks assisted with KYC, AML and portfolio maintenance (10%)</li> <li>• Process review and implementation.</li> <li>• Annual scheme review</li> </ul>
<b>Customer</b>	15%	<ul style="list-style-type: none"> <li>• Ensure 100% participation in product promotional activities, customer events and scheduled product clinics (10%)</li> <li>• Ensure that there is a robust departmental customer satisfaction rating by ensuring the team lives the NCBA Bank Values &amp; CSI above bank acceptable levels determined from time to time.</li> </ul>

<b>Learning and growth</b>	5%	<ul style="list-style-type: none"> <li>Ensure 100% participation in E-Learning Courses / Training (Internal &amp; External sessions &amp; team management).</li> </ul>
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### Job Dimensions

<b>Reporting Relationships: jobs that report to this position directly and indirectly</b>	
Direct Reports	none
Indirect Reports	none

<b>Stakeholder Management: key stakeholders that the position holder will need to liaise/work with to be successful in this role.</b>	
<ul style="list-style-type: none"> <li>Internal</li> <li>Consumer Banking Relationship Managers, Marketing, products, Risk, BRS.</li> <li>Branch Managers, Sales managers, Team leaders &amp; CPAs</li> <li>Corporate &amp; SME RMs</li> <li>All the frontline acquisition teams &amp; risk</li> </ul>	<ul style="list-style-type: none"> <li>External</li> <li>Scheme Partners and key stakeholders e.g. HR managers, CFOs, Payroll admin.</li> <li>Strategic partners e.g. Realtors and property developers ETC.</li> </ul>

<b>Decision Making Authority /Mandates/Constraints: the decisions the position holder is empowered to make</b> <i>(Indicate if it is Operational, Managerial or Strategic). Please also highlight any budgetary control responsibility if applicable for the role.</i>
Managerial decision-making regarding scheme company management and other decisions related to the role. Discretionary negotiation of terms & conditions Recommendations on pricing of various products. Promotions and marketing initiatives for Consumer Banking Products. Recommendations on new products and business alliances under workplace banking proposition.

<b>Work cycle and impact: time horizon and nature of impact (Planning)</b> <i>(e.g. Less than 1 week, 2 weeks, 2 weeks – 1 month, 1 month – 3 months, 3-6 months, 6-12 months, above 1 year)</i>
3-6 months

<b>Ideal Job Specifications</b>
<p><b>Academic:</b> Degree in business related field</p> <p><b>Professional:</b> Customer Relationship Management Course</p> <p><b>Desired work experience:</b> 4 years' working experience in Managing Customer Relations preferably in a banking institution.</p>

### NCBA Bank Core Value Behaviours (Performance Drivers)

- Achievement of Financial Performance & Growth Targets.
- Achievement of customer satisfaction measured through the CSI<sup>1</sup>.
- Achieve high retention and activity of accounts
- Product cross selling success.
- Achieve and grow talent through succession planning.
- Achievement of high customer satisfaction level.
- Generating new company sign-ups
- Relationship Management of existing Corporate effectively to facilitate portfolio growth
- Driving activations & penetration of signed up schemes
- To assess the risk profiles of customer segments & contribute to the development of effective control measures within the product definition document (PDD).
- To grow the portfolio through a focused market segment approach by creating effective relationships that maximize revenues and asset growth
- Establish relationships with key corporates to offer them scheme lending
- To support the launch of products, sales strategy, and campaigns to key segments for profitable and quality business
- Cross-sell to existing corporate customers
- Marketing and campaign management through Supporting branch, Direct sales, contact centre and other sales channels to achieve sales objectives for the bank

### Ideal Job competencies

#### Technical Competencies

- University Degree in - Upper 2<sup>nd</sup> Class or equivalent.
- At least 4 years banking experience, two of which must be in Sales and Relationship management role.
- Proficiency in use of Microsoft Office Packages

#### Behavioural Competencies

- Setting Business Direction
- Inspiring business performance
- Achieving business performance thorough understanding of bank operations
- Build pride and passion
- Growing talent and capability
- Managing & developing yourself
- Delighting customers
- Protect and enhance the Bank's reputation

*This JD is signed-off with reference having been made to the organisation's core values and aligned competencies against these values.*