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# Example of Relationship Director Job Description

Our company is looking to fill the role of relationship director. We appreciate you taking the time to review the list of qualifications and to apply for the position. If you don’t fill all of the qualifications, you may still be considered depending on your level of experience.

## Responsibilities for relationship director

* Build and strengthen relationships with the firm’s client relationships through proactive in-person, verbal and written contact including on-site visits, with a focus on client retention, AUM preservation and customer satisfaction
* Serve as primary contact for assigned institutional clients with responsibility for coordinating various internal resources portfolio management teams, performance analytics, operations, compliance, legal required to deliver products, resolve operational issues and provide high quality service to the clients
* Arrange periodic due-diligence meetings and conference calls with clients and/or their investment consultants to review assigned portfolios, investment guidelines, fund objectives and investment process
* Provide monthly, quarterly and ad-hoc client reports that are typically comprised of portfolio characteristics, performance data and performance attribution, economic and mandate-specific commentary
* Partner with the Sales and Consultant Relations teams in building relationships with prospective clients and consultants
* Participate and provide support in organizing client events Workshops, Conferences, Dialogues Follow up to ensure assigned clients attend the events
* Global management of the sales cycle – product and market campaigns
* This individual will coordinate with numerous firm resources to develop and execute a market growth strategy and approach for each private equity firm assigned to them within the geographic coverage area
* Lead strategy and execution for relationship marketing for consumer and commercial Office365 customers
* Leverage best practices from the industry and deliver test and learn plan

## Qualifications for relationship director

* Local IT organization
* And corporate and field accounting organizations to collaborate on a solution
* A prioritization process to organize customer demand against the existing It resources
* Establish a global business facing BRM/support team for IT
* Cultivate a customer service focus and culture
* 10-15 years relevant consulting, support or development work experience in ERP platforms