



Example of Relationship Assistant Job Description

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Our company is looking for a relationship assistant. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

Responsibilities for relationship assistant

- Strongly assist the RM in origination by preparing pitch book, industry leads
- Assist the RM and CA in preparing briefing notes for senior management visits
- Document the client meetings attended by preparing a call report via the CRM system
- Identify selling opportunities in order to maximise income derived from the relationship
- The position is also responsible for ensuring appropriate sales processes are followed, and the highest levels of controls and compliance are adhered This role may be subject to additional background verification checks
- Assist other originators in FI China team including PAM/LAM and sales to implement business goals
- Any projects/assignments given by Head of FI China
- Good understanding of FI client's businesses
- Assist PAM/LAM to maintain, develop business relationship with clients
- Assist PAM/LAM to map clients' internal organization, establish primary contact with FI clients

Qualifications for relationship assistant

- Advanced Excel skills (ie
- Ability to manage and drive multiple projects simultaneously
- Candidates without industry experience should have employment or

- Leverage multiple communication tools to ensure the drivers follow the norms under the car finance program
- Work closely with the Driver Loyalty and Retention Manager with the set KPIs
- Relevant working experience in relationship and engagement, highly preferable