



# Job Description

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<b>Job Title</b> Account Relationship Manager	<b>Job Location</b> Dar es Salaam	<b>Category</b> -
<b>Job Type</b> Full Time	<b>Job level</b> Manager	<b>Industry</b> Banking
<b>Open to Expatriates</b> Only Open to Tanzanian Nationals		

## Minimum Requirements

<b>Min Budget</b> -	<b>Max Budget</b> -	<b>Primary Industry</b> Banking: 3 Years
<b>Secondary Industry</b> -	<b>Primary Category</b> -	<b>Secondary Category</b> -
<b>Certificate</b> -	<b>Qualification</b> -	

## Summary

To achieve quality business growth for the Private Banking segment within assigned territory. The responsibilities incorporate market and selling personal banking products to existing and potential customers. In addition, sustaining customer satisfaction, retain existing customers and generate additional business from those customers; and acquiring new customers through prospecting and sales

## Responsibilities

- Develop Private banking customer base and expand the Unit's business growth through marketing of the private banking products & services
- Ensuring revenue growth through customer acquisition, identification and product cross-selling.
- Adhere to KYC (Know Your Customer) and Anti Money Laundering (AML) requirements.
- Manage the referral process in line with the credit Policy.
- Ensure that the renewals, extensions and cancellations of existing credit facilities are done before the expiry date.
- Assist in the organisation and participate in public relations activities and sponsorship that aim to improve brand image in the market.
- Monitor closely all unsecured credit facilities and overdrawn accounts assigned to ensure the accounts are properly conducted to avoid potential loss to the bank.
- Ensure full compliance with the Banks policies and procedures.
- Develop a strong Customer relationship management system aimed at customer retention and maximising on every relationship.
- Manage customer queries, complaints and other correspondence in a timely manner and within set standards for customer satisfaction.
- Assume direct responsibility for a private banking process improvement project aimed improving the Unit's ability to deliver efficient and timely service to its customers.
- Assist in identifying customer needs not met by existing products and the implementation of new products & services.
- Achievement of sales goals for the unit by aggressive customer acquisition, efficient product delivery, offer a diverse range of products and excellent customer service.
- Cross selling of bank products and services to both potential and existing clients

- Train and develop direct reports and responsible for review of the performance through conducting an annual performance appraisal
- Be conversant with policies and procedures pertaining to all banks products and services.
- Pursue own development to increase personal effectiveness acknowledge strength and areas of development.

## Education & Qualifications

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- University Degree or Equivalent-Upper second Division or equivalent

## Requirements

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- 3 years banking experience or customer relationship, 2 of which should be in a sales role.
- Practical use of Microsoft Office Packages
- Develop the Private banking customer base and expand the unit's business growth through marketing of the Personal banking products and services.
- Providing an interface between the bank and both existing and prospective customers in order to maintain good customer relations so as to meet the customer needs within the strategic objectives of the Bank.
- Credit appraisals and recommendation for existing and prospective customers under the various loan products and submit to the appropriate final approval authority within established turnaround time.
- Overseeing the relationship management of assigned customers and the running of the Private Banking Centre.
- Ensuring revenue growth through customer acquisition, new need identification, product cross-sell and re-engineering.
- Conduct initial screening interview with prospective customer and maintain familiarity with
- Customer's pertinent documents.
- Ensure that the target market selection criterion is adhered to and that we are in full compliance with Know Your Customer (KYC) and Anti Money Laundering (AML) requirements.
- Ensure an effective call program is maintained on all allocated relationships and prospects. The calls should be recorded and filed.
- Participate in Corporate Bank and Institutional Bank customer calls for marketing initiatives.
- Manage all aspects of risk, including monitoring of advances portfolio, strict adherence to the provisions of the credit policy document to ensure minimal losses to the bank.
- Monitor closely all unsecured credit facilities and overdrawn accounts assigned to ensure that the accounts are properly conducted to avoid potential loss to the Bank.
- Ensure that renewals, extensions and cancellations of existing credit facilities are done before the expiry date.
- Manage customer queries, complaints and other correspondence in a timely manner and within set standards for customer satisfaction.
- Assume direct responsibility for a Private Banking process improvement project aim improving the Unit's ability to deliver efficient and timely service to its customers.
- Achievement of set revenue targets for the unit by aggressive customer acquisition, efficient
- Product delivery, offering a diverse range of products and excellent customer service.
- Implement findings/decisions emanating from personal development needs and regular coaching feedback from the unit head.
- • Train and develop direct reports and responsible for the review of the performance through
- Conducting the annual performance appraisal
- Keep abreast of the rapid pace of product development to be able to sell new products.
- Be conversant with policies and procedures pertaining to all bank products and services and be able to adapt to change in these as well as technological changes, and customer sophistication.
- Assist in the organization and participate in Public relations activities and sponsorships that aim to improve brand image in the marke

## Characteristics

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**DRIVEN:** We are passionate, make bold decisions and learn from our failures. We seek new challenges and appreciate different views constantly raising the bar. We explore our full potential

**OPEN:** Our interactions are candid, honest and transparent. We listen to each other and our clients. We are Inclusive and always respect each other.

**RESPONSIVE:** We are proactive, act quickly and resolutely to deliver results. We put our customer's interests at the heart of all that we do. We keep it simple and seek new ways to improve

**TRUSTED:** As a trusted partner, we do what is morally right always. We keep our word. We are accountable and believe in each other

## Reporting To

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Head-Branch Business & Wealth Management

## Driving Licence

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Not Required

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