



Senior Client Relationship Manager

Based in the City of London and remotely

Salary: c.£50,000pa to £60,000pa, depending on your skills

Plus £7.5% company pension contribution

A travel allowance of £2,500 per annum

Hybrid working arrangements

Discretionary Bonus

The CISI is looking for an experienced Client Relationship Manager to develop and maintain positive relationships with key clients and raise awareness of the Institute. The successful candidate will also be a principle contact with branch membership committees.

You will be:

- Liaising with existing key customers to provide them with an effective communication channel and updating them on new developments which will include delivering presentations.
- Monitoring and reviewing key customers, and producing reports to include statistics, highlighting business activity with the Institute and possible avenues of development.
- Identifying new business opportunities and develop new clients, to increase the companies using CISI's products and services.
- Liaising with the Customer Support Centre's relevant account managers obtaining up-to-date account information, i.e. account issues, product sales, contacts, potential areas of growth, and feeding back comments from clients, agreeing action points, if required
- Acting as committee secretary for branch committees, which may include attending meetings, taking minutes, sending out newsletters, ensuring action points are dealt with and liaising with the committee as required.
- Assisting the committee President to develop the committee and branch.

The following skills and experience are required:

- 5+ years' experience in a Client Relationship Management role
- 2+ years' experience within the Financial Services sector
- Experience chairing meetings
- Strong organisation and time management skills, with the ability to prioritise your own workload and work independently.
- Strong interpersonal skills; you will be liaising with external firms and networking at events
- Strong IT skills – word, excel, and familiarity with databases.
- Attention to detail and able to work to deadlines.
- Strong presentation skills - Please also let us know if you have experience presenting at universities.

We offer a competitive remuneration package, which includes:

- 7½% company pension contribution into a personal pension, in addition to your own contribution of 1½% via salary exchange
- Life insurance and income protection insurance
- A Wellness Allowance of up to £30 a month
- 28 days leave per annum (which includes the institute closing for three days between Christmas and New Year).
- A travel allowance after passing probation which has a minimum value of £2,500 per annum
- Hybrid working arrangements.

Please send your CV, salary expectation and availability to HR at jobs@cisi.org

Candidate Adjustments

At CISI we encourage applications from a neurodiverse workforce so please do reach out to HR@cisi.org to discuss reasonable adjustments if required.

Our London office is open plan with agile desk booking; however, we are able to arrange reasonable adjustments for candidates that require a fixed working space.

We value the contribution that employees with different views and experience bring to the Institute and are committed to promoting equality, inclusion and diversity. We hope to receive applications from a wide range of talented people irrespective of their race, religion or belief, gender, age, gender identity, neurodiversity, disability, sexual orientation, ethnic origin, political belief, social class, relationship status or caring responsibilities.

The Chartered Institute for Securities & Investment is the leading professional body for securities, investment, wealth and financial planning professionals. Formed in 1992 by London Stock Exchange practitioners, we have a global community, which aims to promote high standards of competence and integrity to more than 40,000 members in 116 countries. We are also the main examining body for the sector, offering our internationally recognised exams globally.

Its purpose is *"To champion lifelong learning and integrity, raising individual standards of knowledge, skills and behaviour globally to enhance public trust and confidence in financial services."*

For more information on the CISI, please see our website at www.cisi.org