



## ROLE PROFILE

<b>JOB TITLE:</b>	Client Relationship Manager
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### 1. PRINCIPAL OBJECTIVE OF POSITION

To ensure that quality services and effective social investment strategies are delivered to Tshikululu's clients in a manner that ensures client satisfaction. This is to be achieved through managing the implementation of client fund strategies, managing client relationships effectively and delivering high impact social investment value. The Client Relationship Manager is the primary interface between Tshikululu and its clients.

### 2. KEY PERFORMANCE AREAS, ACTIVITIES AND INDICATORS

Key Performance Areas	Activities
<b>Client Relationship Management and Implementation</b>	<ul style="list-style-type: none"> <li>• Deliver the end-to-end client management process by implementing processes, policies and procedures, delivering on defined objectives and addressing queries and challenges within SLA.</li> <li>• Manage that all funds under management are reviewed for compliance to all relevant legislation annually, implementing required amendments with trustees and reporting as required.</li> <li>• Establish relationships with all client and internal Tshikululu stakeholders by communicating goals, objectives, and timelines clearly and building resilient mutually responsive relationships as required.</li> <li>• Build strong relationships and play the primary contact role with clients by providing them with prompt and knowledgeable expertise, support and guidance on social investment and fund management and becoming the go-to resource and their primary point of contact.</li> <li>• Implement deliberate, formal client retention strategies for all clients under management.</li> <li>• Implement Tshikululu's approach to Fund Management by complying with the approach and delivering to standard on an ongoing basis.</li> <li>• Evaluate key client relationships and engage with stakeholders and clients by attending meetings, representing Tshikululu, supporting delivery of client objectives and resolving client queries and issues within SLA and as required.</li> <li>• Negotiate and deliver client SLAs according to the Tshikululu policy, procedure and standard.</li> <li>• In partnership with the rest of the Tshikululu team, ensure that all aspects of client work are delivered to the highest professional standards.</li> <li>• Manage and grow existing client relationships and influence positive change in their social investment by identifying</li> </ul>

Key Performance Areas	Activities
	<p>opportunities, developing recommendations and implementing approved approaches as required.</p> <ul style="list-style-type: none"> <li>• Manage client expectations and the scope of work by communicating effectively, ensuring that expectations are supported by documentation and delivering agreed services.</li> <li>• Maintain accountability for all deliverables submitted to clients by overseeing, commenting, amending and providing feedback before deliverables are distributed.</li> </ul>
<b>Client Fund Strategy</b>	<ul style="list-style-type: none"> <li>• Work closely with the social impact team to develop strategies that align to and enhance clients' social investment and business strategic objectives. <ul style="list-style-type: none"> <li>○ Implement approved strategies by following implementation policy and procedure, measuring delivery in line with objectives, tracking progress and delivering according to deadlines.</li> <li>○ Identify and resolve challenges that impact on the ability for client strategies to be delivered.</li> <li>○ Evaluate and report on impact of strategies by gathering required research, collating, analysing and reporting by agreed deadlines.</li> <li>○ Present strategy successes and failures and implement lessons learned.</li> </ul> </li> </ul>
<b>Reporting</b>	<ul style="list-style-type: none"> <li>• Report on SLA and investment delivery by collecting information, developing reports and submitting by the approved deadlines and to standard.</li> <li>• Complete reports accurately and completely against defined standards and resolving issues within SLA.</li> <li>• Develop and submit any other reports by collecting required information, collating and submitting according to the defined structure.</li> </ul>
<b>Business Development</b>	<ul style="list-style-type: none"> <li>• Identify opportunities to increase Tshikululu services within existing clients by engaging with clients, discussing existing contracts and initiating discussion on providing additional support.</li> <li>• Support the achievement of business acquisition targets by resolving service issues, building resilient and mutually beneficial relationships and resolving potential customer threats in existing clients as required.</li> <li>• Achieve business development targets for Fund Management by identifying opportunities, building relationships and closing deals as required.</li> </ul>

### 3. ROLE REQUIREMENTS

#### Qualifications and Experience

- Honours Degree in Business Administration, Social Science, Commerce or similar.
- 3-5 years of client relationship/account management experience
- A minimum of 2 years developing and implementing operational programmes and solutions in SCR, CSR or Transformation experience is preferred

### 4. KEY INTERACTIONS / RELATIONSHIPS

Client Portfolio Manager

Clients

Specialist Services Manger  
Knowledge and Research Manager

Preference will be given to South African citizens.  
Appointments will be made in line with Tshikululu's Employment Equity plan and other required legislation.

**Candidates with disability are encouraged to apply.**

Tshikululu Social Investments will not be liable interview travel cost or relocation cost.

We reserve the right not to proceed with the filling of the post advertised.

An application will not in itself, entitle the applicant to an interview.

Please ensure that you meet the above requirements before you apply.

Only short-listed applicants will be contacted.

Please email your applications to: [careers@tshikululu.org.za](mailto:careers@tshikululu.org.za).

**If you have not been contacted within six weeks of the closing date, please accept that your application was unsuccessful.**