

# Chartered Banker

*The Chartered Banker Institute is the only professional banking institute in the UK. We are an educational charity, established by Royal Charter. We are the only body in the world able to confer the status of Chartered Banker to suitably qualified individuals. Throughout our existence we have driven an agenda of ethical professionalism. We are committed to promoting professional standards for bankers, providing professional qualifications for retail, commercial and private bankers in the UK and overseas, and offering professional membership to qualified individuals. [www.charteredbanker.com](http://www.charteredbanker.com)*

## **JOB DESCRIPTION**

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| <b>Job Title:</b>  | <b>Professional Standards Manager</b>                             |
| <b>Reports To:</b> | Head of Professional Standards                                    |
| <b>Role:</b>       | Full time – 35 hours per week                                     |
| <b>Location:</b>   | Flexible – option to be based in the Edinburgh office, or at home |

### **Job Purpose:**

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The Professional Standards Manager consults with financial service firms (primarily banks) to identify and develop pathways to professional membership, through the achievement of professional standards and attainment of professional qualifications for individuals.

The individual is responsible for generating new business and revenue, by managing and growing a portfolio of financial services firms throughout the UK.

### **Duties & Responsibilities:**

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- Conduct detailed needs analysis for clients, collaborating with SME's in preparing proposals and presentations in line with firms' requirements;
- Contribute to the achievement of the overall strategy, annual revenue, and business objectives of the Institute;
- Work closely with colleagues across a variety of functions, particularly Business Support to ensure timely implementation, onboarding, and achievement of client deliverables;
- Deliver both virtual and face to face presentations, seminars, promotional events and talks which support aims of professional body and can be adapted to audiences of varying levels of seniority;
- Establish, develop, and build effective managed relationships with key stakeholders within allocated banks and financial services organizations, supporting firm's apprenticeship and professionalism strategies and future plans;
- Support contracting process from end-to-end;
- Ensure engagement with colleagues across the business to successfully implement new clients;
- Identify new clients and generate new opportunities for growing professional standards, professional qualifications, apprenticeships, and professional membership whilst developing existing relationships;
- Establish and develop opportunities for banks to achieve Corporate Chartered status;
- Collaborate with team of Professional Standards Managers and Institute colleagues more broadly, to share best practice and provide insight to improve team dynamics/offerings;
- Support the growth of professional practice through responsible banking, and the cultural change required to deliver sustainable banking.

## Qualifications, Skills & Experience:

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### The job holder requires to have:

- 3-5 years of similar experience preferably from the banking or financial services sector or in another professional environment;
- 3-5 years business development or learning consultancy experience essential;
- A qualification in banking or related discipline would be desirable;
- Sound knowledge of the banking and financial services industry and awareness of the changing dynamics of digital and sustainable agendas on the profession

## Person Specification:

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- Creative and effective communication skills both written and verbal, good customer care skills, excellent influencing skills;
- Excellent prioritisation and time management skills, the ability to multi-task and work in an organised manner to strict deadlines;
- Strong stakeholder management skills with experience of working and engaging with internal and external stakeholder;
- The ability to develop strong and positive relationships with the ability to communicate at all levels through different medias;
- A good level of commercial acumen with the ability to successfully turn leads into income-generating activities;
- A self-starter, someone who is driven, innovative and adapts to change;
- Exceptional attention to detail and accuracy;
- Ability to problem solve and troubleshoot;
- Competent user of Microsoft Office and Dynamics 365, or similar CRM application

## Person Specification

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Champions our Core Values by demonstrating:

- **Excellence** through attention to detail and accuracy and consistently producing a high standard of work within agreed timescales.
- **Innovation** - advocate of change with a strong ability to make decisions, problem solve and troubleshoot. Is innovative and has a creative approach to the design and delivery of learning solutions.
- **Integrity** – strategic and analytical thinker with the ability to work autonomously in consultation and collaboration with corporate clients. Can prioritise and organise own and team workflow on a daily basis.
- **Collaboration** – proven ability to influence, build and maintain effective relationships with colleagues and clients. Is client-centered, collaborative and results driven.