Key Bank
Sr. Client Experience Manager (3 open positions)

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locations

Cleveland, OH (3 locations – Cleveland West 166 Crocker Park, Westlake, OH, Cleveland East 30100 Chagrin Blvd, Ste 100s, Pepper Pike, OH & Cleveland Downtown 127 Public Square, 12th Floor, Cleveland, OH)

JOB BRIEF (PURPOSE)

Responsible for ensuring delivery of the Key Private Bank (KPB) client experience and contact strategy for a book of business in coordination with the Sr. Relationship Manager and client advisory team Investment, Fiduciary and Planning Strategists.. Accountable for maintaining and helping to grow approximately 100 client relationships through a proactive focus on meeting client needs as it relates to planning, investments, trust, banking and client service. Leverages technology in the management of client relationships and delivery of advice. Ensures a focus on client experience and retention through conducting the following activities:

- Conducts or coordinates the client Discovery conversations and establishes client goals with the Relationship Manager
- Develops and maintains ongoing Wealth Issues Reviews and Wealth Roadmap for assigned clients
- In concert with the Relationship Manager initiates financial planning process including data gathering
- Works with Regional Planning Strategist and Central Planning Team in building client Plans
- Works with the team to present Financial Plans and manages Plan implementation
- Wealth Direction Set-up, client onboarding and use in delivering of the client experience
- Works with Relationship Manager and Wealth Advisor for the Client Onboarding process
- Coordinates the Client Communication Plan including annual Wealth Plan Update
- Coordinates team to meet client needs and provide timely advice
- Coordinate client wealth plan updates (Scheduling, Preparing, Leading, Follow-Up, Implementation, Asset Allocation Review, Estate Document Review, Planning)
- Provide and educate clients on Wealth Direction (Goals, Concerns, Priorities, Net Worth, Planning & Advice). Ensures client usage and achieves goal through Wealth Direction penetration.
- Advise clients on wealth issues such as review of outside Assets, Life, Disability, LTC and P&C Insurance, Credit and Deposit Needs, Estate Document and Planning Review, Asset Allocation Reviews, Liquidity and Life Events
- Collaborate with Sr. Relationship Manager and client advisory team on sales opportunities by assisting with the prospect proposal process, effectively onboarding new client relationships and identifying new business opportunities for existing book of business
- Ensure superior client servicing activities are maintained with support from Associates and central/national resources
- Identify and escalate at risk client situations to Relationship Manager and Sales Leader

ESSENTIAL JOB FUNCTIONS

The Client Experience Manager is responsible for functions that align with the KPB prescribed Client Experience based on each Client's Value Segmentation to create a constructive client experience. This includes:

Opportunity Management
- Maintains and expands current client relationships.
- Accountable for management of book of business in Salesforce (house holding, client profile updates, contact management, task management)
- Develops and maintains an in-depth knowledge of financial wealth management services and products as well as knowledge of competitors and competitive products.

- Leads, coordinates, and assembles advisory team based on client needs. Acts as lead and/or client advocate/ representative on assembled team.
- Employs and maintains a disciplined approach to client review process using designated tracking tools to document progress on implementation of client strategies.

Needs Assessment

- Develops a comprehensive understanding of client's needs, based on the review and analysis of personal and business financial data gathered through Relationship Reviews, Client Insights and Internal Partners.
- Determines client needs and opportunities using Building Mastery and KPB Planning approach.
- Delivers distinctive service by completing annual relationship reviews with all assigned clients, consistently updates the tools with current client data, call summaries, etc.
- Collaborates with relationship management team to deepen the relationship based upon need and assessment.

Presentation

- Prepares and delivers client presentations, individually and as part of a team, presenting appropriate financial solutions via consultative review and proactive contact. Uses Wealth Direction consistently.
- Promotes and cross-markets products and services to clients by keeping clients informed of products and services.
- Actively listens to concerns, presents a clear concise picture and provides the client with targeted solutions to close the sale.

Follow-Up

- Maintains ongoing contact with new clients to ensure a consistently positive experience with Key throughout onboarding process.
- Maintains all banking products, including credit while mitigating risk.

MARGINAL OR PERIPHERAL FUNCTIONS

- Provides feedback to partners regarding new product development

REQUIRED QUALIFICATIONS

- Ten plus years of demonstrated sales and business development experience with proven results
- Demonstrated strong or advanced knowledge of Investments, Trust and Credit; ability to consult and prioritize client needs
- Demonstrated in depth knowledge of financial products and banking regulations
- Demonstrated strong client advisory and servicing skills
- Demonstrated experience with and broad understanding of personal financial statements
- Proven experience with and comprehensive understanding of consumer or customized lending
- Aptitude and interest in using technology in the management of relationships and delivery of client advice
- Excellent verbal and written communication skills
- Undergraduate degree in business related field or equivalent work experience
- Proficient in personal computer applications to drive results

PREFERRED QUALIFICATIONS

- Certified Financial Planner, CWS or equivalent experience.

COMPETENCIES/SKILLS

Client Focus - Is dedicated to meeting the expectations and requirements of internal and external clients; gets first-hand client information and uses it for improvements in products and services; acts with clients in mind; establishes and maintains effective relationships with and gains their trust and respect

Strategic Agility - Sees ahead clearly; can anticipate future consequences and trends accurately' has broad knowledge and perspective; is future oriented; can articulately paint credible pictures and visions of possibilities and likelihoods; can create competitive and breakthrough strategies and plans.

Command Skills - Relishes leading; takes unpopular stands if necessary; encourages direct and tough debate but isn't afraid to end it and move on; is looked to for direction in a crisis; faces adversity head on; energized by tough challenges.

<u>Negotiating</u> - Can negotiate skillfully in tough situations with both internal and external groups; can settle differences with minimum noise; can win concessions without damaging relationships; can be both direct and forceful as well as diplomatic; gains trust quickly of other parties to the negotiations; has a good sense of timing.

<u>Building Effective Teams</u> - Blends people into teams when needed; creates strong morale and spirit in his/her team; shares wins and successes; fosters open dialogue; lets people finish and be responsible for their work; defines successes in terms of the whole team; creates a feeling of belonging in the team.

<u>Process Management</u> - Good at figuring out the processes necessary to get things done; knows how to organize people and activities; understands how to separate and combine tasks into efficient work flow; knows what to measure and how to measure it; can see opportunities for synergy and integration where others can't; can simplify complex processes; gets more out of fewer resources.

EQUIPMENT USED

- Wealth Direction, MS Windows and Office Products, Client Experience Desktop and Salesforce when implemented, all systems aligned with RBAC Profile

TRAINING REQUIRED

- Completion of training as assigned and or required.