

# PERFORMANCE MAP: RM2/RM3



<p><b>Objectives</b></p> <ul style="list-style-type: none"> <li>• Exceed annual income targets</li> <li>• Maximise group income through management of an assigned portfolio</li> <li>• Origination of new business via development of an assigned territory</li> <li>• Identify, acquire, develop and maintain customer relationships</li> <li>• Achieve and maintain a high level of customer satisfaction</li> <li>• Apply credit stewardship principles, Manage risk – operate within company standards</li> </ul>	
<p><b>Performance</b></p> <ul style="list-style-type: none"> <li>• Determine and implement a strategy to:             <ul style="list-style-type: none"> <li>– Identify sources of new business, including non-group relationships</li> <li>– Prospect new customers &amp; introducers</li> <li>– Manage and grow existing relationships</li> </ul> </li> <li>• Implement agreed strategy with Bank &amp; product partners to achieve optimal business performance</li> <li>• Exceed minimum sales standards</li> <li>• Marketing new and existing customers, to include working with Co-ordinators on: research, canvassing, mail shots</li> <li>• Regular planning with Sales Co-ordinator</li> <li>• Identify opportunities to introduce new customers to the Bank &amp; product partners</li> <li>• Understand local market and implement strategy to exploit opportunities</li> <li>• Effectively engage LBF colleagues and appropriate use of large corporate team</li> </ul>	<p><b>People</b></p> <ul style="list-style-type: none"> <li>• Flexible and versatile approach to complement Sales Team activities</li> <li>• Coach, develop and encourage -- continually</li> <li>• Build strong, effective internal relationships, particularly with Functions and Business Partners</li> <li>• Be an active team player – within the wider team</li> <li>• Own your personal development plan, understand strengths and weaknesses in relation to the job competencies</li> <li>• Manages and develops Co-ordinator</li> </ul> <p><b>Career Mapping Examples</b></p> <p><b>From:</b></p> <ul style="list-style-type: none"> <li>• CCB, Retail Bank, Large Corporate</li> <li>• Sales Co-ordinator</li> <li>• Product Partners</li> </ul> <p><b>To:</b></p> <ul style="list-style-type: none"> <li>• Corporate Director, Asset Finance, Director, Asset Finance, Large Corporate</li> <li>• CCB, Retail Bank</li> <li>• Internal Functions, Product Partners</li> </ul>
<p><b>OUTSTANDING BEHAVIOURS</b></p> <ul style="list-style-type: none"> <li>• Determination to make it happen</li> <li>• Continually show positive attitude and 'can do' approach</li> <li>• Act entrepreneurially – finding a solution – catalyst</li> <li>• Regarded as a Trusted Business Partner</li> <li>• Be a selfless team player – ability to balance team &amp; personal objectives</li> <li>• Continually show energy and enthusiasm</li> <li>• Uses LPM ensuring time/income maximised</li> </ul>	<p><b>Desirable Examples / Start / Continue:</b></p> <ul style="list-style-type: none"> <li>• Creating targeted plans for key accounts</li> <li>• Effective delegation of non-income generating responsibilities</li> <li>• Trusting other partners to do their part</li> </ul> <p><b>Undesirable Examples / Stop:</b></p> <ul style="list-style-type: none"> <li>• Updating own MI</li> <li>• Handling customer service issues that belong elsewhere, e.g. lost cheque, lost paperwork, etc.</li> <li>• Negative behaviours / Making excuses</li> </ul>
<p><b>Partnerships</b></p> <ul style="list-style-type: none"> <li>• Always put customers first</li> <li>• Identifies customer needs</li> <li>• Builds joint asset solutions</li> <li>• Establish and implement strategy for most important customers</li> <li>• Seek customer referrals</li> <li>• Ensure effective resolution of customer complaints</li> <li>• Maximise settlement opportunities</li> </ul>	<p><b>Process</b></p> <ul style="list-style-type: none"> <li>• Continuously and constructively challenge barriers to business</li> <li>• Minimise and challenge bureaucracy</li> <li>• Share and implement best practices</li> <li>• Contribute and support team initiatives</li> <li>• Promote &amp; work effectively with business partners</li> <li>• Ensure compliance requirements are met</li> <li>• Ensure credit applications, deal quality and underwriting meet required standards</li> <li>• Maintain and apply knowledge of product portfolio, as appropriate</li> <li>• Ensure full, effective use of sales management systems</li> <li>• Maximise team resource</li> <li>• Implement model week principles, as agreed with Director</li> </ul>
<p><b>Measures</b></p> <ul style="list-style-type: none"> <li>• <b>Financial Performance:</b> weekly and monthly official MI including default</li> <li>• <b>Staff:</b> implement climate scan action plans, productivity, absence, performance against PDP.</li> <li>• <b>Customers:</b> customer retention, customer satisfaction survey, new customer / income growth</li> <li>• <b>Operational:</b> key control and credit audit</li> </ul>	