

## Business Adviser – Relationship Manager

### Job Description

<b>Job Title</b>	Relationship Manager
<b>Line Management</b>	Projects Director
<b>Reports to</b>	Business Development and Growth Delivery Manager
<b>Salary</b>	£42,617 - £48,080
<b>Hours of Work</b>	37 hrs
<b>Term</b>	Up to 31.3.2025 with possible extension
<b>Division</b>	Business Wales: – Business Development and Growth
<b>Location</b>	Homeworking Hot Desking & Co Working Locations available accross Wales
<b>Travel</b>	Requirement to visit sites and clients and attend events, will mean that ability to travel is essential.

### Introduction

Menter Môn in partnership with Business in Focus and M-SParc have secured the contract to deliver the Business Wales service. Known collectively as Enterprise Partnership Cymru (EPC) we will be providing advice and support to entrepreneurs pan-Wales, on behalf of the Welsh Government.

EPC was successful in their bid to deliver both Business Wales advice services, Entrepreneurship and Start-up Service and Business Development and Growth Service.

The Business Development and Growth Service focuses on providing a wide range of advice to growing businesses through a variety of means including digital, telephone and face to face support.

## **The Role**

Relationship Managers work with a portfolio of programme eligible clients on a 1-2-1 basis using digital and face-to-face formats. The Relationship Manager applies a holistic approach, using their significant experience and knowledge of business to undertake a comprehensive diagnostic, developing a tailored Strategic Operational Growth Plan (SOGP) of issues and priorities.

To support clients achieve growth/high growth, the Relationship Manager:

- Facilitates in-house specialist advice from the full suite of Business Wales resources, and/or
- Brokers support from within the business support Ecosystem,
- Utilising their diverse professional network (i.e., local, regional, industry sectors, public and private sectors) to facilitate the development of working relationships.

Relationship Managers provide support and advice internally; to develop and maintain innovative and relevant client resource content and engaging activities, and contribute to colleague CPD.

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## **The Responsibilities**

1. **Utilise approved diagnostic tools to ascertain an understanding of a client's business and identify barriers to development and growth.**
2. **Use approved business tools, e.g., Target Operating Model (TOM), Business Model Canvas (BMC), to develop a Strategic Operating Growth Plan (SOGP) for each client, identifying actions and objectives on a Roadmap for Growth (RFG) to maximise achievement of client's growth potential.**
3. **Identify appropriate solutions and services, specific for each client. Utilising digital support platforms, signpost to appropriate resources.**
4. **Provide advice through a diverse range of methods; digital, e.g. webinars on appropriate digital platforms, 1-2-1 and 1-many online meetings, as well as face-to-face delivery. Undertake these activities in a professional and knowledgeable manner using the agreed training materials.**
5. **Make recommendations leveraging the full suite of services available in the Business Wales services, e.g. Specialist support.**
6. **Act as an honest broker for the spectrum of initiatives and services available in the public sector, e.g. WG Sector Teams, HE/FE Institutions, and/or services available from the wider Ecosystem of specialist service providers in the private sector.**
7. **Identify clients within the BW portfolio with the true potential and ambition for accelerated growth, facilitate timely and comprehensive handover to the Accelerated Growth Programme (AGP).**
8. **Identify clients with the potential to benefit from referral to the Mentoring Programme.**
9. **Contribute to the development of the Ecosystem by regular engagement with and periodic Chairing of the Ecosystem Participation Panel (EPP) to ensure it is effective to adding value for clients.**
10. **Work collaboratively with colleagues and external stakeholders, develop and deliver bespoke provider solutions for clients to accelerate the growth of the business, e.g., liaise with Business Growth Advisers for clients who are not eligible for Relationship Manager programme support, Mentoring Agents to ensure that the appropriate mentoring support is provided.**
11. **Complete and regular review of a bespoke RFG action plan with clients to achieve outcomes, evidence in the necessary digital paperwork, in compliance with contractual requirements and operational procedures. Ensure support hours are delivered, documented and signed off.**

12. Monitor client activity/progress against their RFG to maximise outcomes/KPIs for WG and provide material/case studies for marketing content.
13. Manage relationships with clients and partner organisations in a timely manner. Ensure that effective working relationships are maintained and outcomes are achieved and evidentially recorded. Propose modifications to the RFG where necessary.
14. Develop and deliver content and resources, e.g., 'Growth Path' Workshops and participate in other seminars and activities that attract and engage growth clients. Undertake these activities in a professional and knowledgeable manner using the agreed training materials.
15. Provide additional support to Business Wales team colleagues, e.g. assisting with digital delivery, participation in additional projects, details of client outcomes to assist engagement campaigns.
16. Encourage clients to engage with the relevant business-to-business Growth networks that may assist them in achieving business development and growth potential. Make appropriate suggestions and signpost clients accordingly.
17. Establish and develop effective local and national network, managing relationships for engagement with clients, colleagues and stakeholders. Develop individual engagement plans to promote the Relationship Manager Programme and self-generate eligible clients, the Business Wales service, and brokerage for advice. Attend appropriate networking and engagement events.
18. Contribute to the development of the Ecosystem to ensure services available from procured specialist service providers in the private sector remain relevant and up to date.
19. Identify and encourage clients with the potential to be BW ambassadors or to participate in the BW Mentoring programme as a Mentor.
20. Maintain knowledge of local, national and sector specific developments in specialist area, general business trends and practice. Undertake appropriate and agreed learning to maintain CPD. Proactively share intelligence information on a regular basis to develop engagement, reach and service provision in the appropriate forums, as directed by Delivery Manager.
21. Share knowledge and provide advice on areas of specialism to Business Wales colleagues and clients. Work with Delivery Manager to develop continuous improvement and CPD training to colleagues in the wider service.
22. Undertake any other duties as reasonably required by the Senior Management Team.

#### **Equality & Diversity:**

23. Promote the equality and diversity through the business support provided to Business Wales clients;
24. Maintain an up-to-date awareness, training and CPD of equality & diversity issues and how to professionally deliver an inclusive service to all clients.
25. Deliver an inclusive service in line with Menter Môn's values and contractual requirements.

*The above is a broad definition of the job responsibilities. It does not consider every aspect of the job which the jobholder may be required to perform. Flexibility is essential since the jobholder's working hours will be determined by the requirements of the business.*

## Person Specification

Requirements	Essential	Desirable
<b>Education &amp; Training</b>		
Advisory qualification, e.g. ILM Level 5 Business Support, SFEDI Level 5, or equivalent <b>OR</b> Management Qualification, e.g. ILM Level 5 Management, or equivalent <b>OR</b> Degree level or above in a business related qualification		✓
Introductory Certificate in accountancy / finance, e.g. AAT level 1 or equivalent financial qualification		✓
<b>Experience &amp; Knowledge</b>		
Experience of running/managing a business with significant turnover and employment levels <b>OR</b> significant experience at senior management level, with responsibility and influence for business strategy and operations that operated: <b>OR</b> Proven experience of delivering business advice* to a diverse portfolio of businesses that operated: <ul style="list-style-type: none"> <li>• On a Regional/ National/ International basis;</li> </ul> <b>AND/OR</b> <ul style="list-style-type: none"> <li>• Achieved turnover exceeding £750k per annum;</li> </ul> <b>AND/OR</b> <ul style="list-style-type: none"> <li>• Experienced 15% growth** in turnover and/or headcount in 2-5 years</li> </ul> <b>AND/OR</b> <ul style="list-style-type: none"> <li>• Employs minimum 25 employees or more</li> </ul> <p>(* - "business advice" is defined as: Advising an extensive portfolio of businesses with a diverse range of business issues, with proven results on how advice given significantly contributed to them improving, achieving growth** and other business objectives).</p>	✓	
Working knowledge of all AND be a specialist in one of the following: <ul style="list-style-type: none"> <li>• Financial management: bookkeeping, record keeping for HMRC, HMRC requirements inc. NI, Insurances required e.g. Public Liability etc., Business Rates</li> <li>• Accessing finance in both public and private sectors</li> <li>• Taxation and Company Law</li> <li>• Marketing including social media</li> <li>• Sustainability, resource efficiency, decarbonisation</li> <li>• Environmental management systems and standards</li> <li>• Quality management systems and standards</li> <li>• HR and leadership and management issues</li> <li>• Equality &amp; Diversity legal requirements, employment subsidies available</li> <li>• International Trade</li> <li>• Innovation</li> <li>• Industry 4.0</li> <li>• Intellectual Property</li> </ul>	✓	

<ul style="list-style-type: none"> <li>• Information, Communication Technology/Digital</li> <li>• Supply chain/procurement</li> <li>• Manufacturing /production methodologies, e.g. Just in Time, Lean</li> <li>• A sector or industry specialist</li> </ul>		
Significant understanding and experience of financial management information in a diverse range of businesses, sectors and/or industries.	✓	
Experienced in compiling complex Business Plans and CFF completion.	✓	
Experience of accessing or supporting businesses to access a variety of different finance products, debt / equity etc.	✓	
Proven experience in a business development and/or account management/relationship management role including experience and delivery and management of tailored solutions and packages of support.	✓	
A developed and extensive network of contacts in both Public and Private sector that is effective in supporting achievement of objectives.	✓	
Effective application of a range of recognised management and business tools and methods to identify and diagnose business issues, develop and implement an action plan to achieve desired goals and objectives.	✓	
Detailed knowledge and understanding of the needs and issues impacting SMEs in Wales, the economy in Wales and wider influences, e.g. UK.	✓	
Understanding of local / regional differences in the Welsh economy.	✓	
Comprehensive awareness and knowledge of general business support available from public and private sectors	✓	
Knowledge of developing organisational structure and succession planning to achieve growth aspirations and plans	✓	
Awareness of Entrepreneurial and Leadership skills, e.g. vision, initiative, self-start/drive, resilience, motivated, etc.	✓	
<b>Skills &amp; Competencies</b>		
Leadership – takes decisions and measured/assessed risks to achieve results, awareness of corporate issues and has energy and commitment.	✓	
Effective in performance management by setting objectives, planning and adapting to change, sets and works to high standards.	✓	
Communication - verbal: Adapts style and detail to audience. Ability to interact effectively with people; persuading and influencing people at all levels; explains/presents information concisely and logically.	✓	
Communication - written: Adapts style and detail to audience. Presents information accurately, succinctly, and logically.	✓	
Planning and project management for delivery – sets clear goals and monitors progress, undertakes risk management, provides support and engages with experts when necessary.	✓	
Effective in determining priorities, planning time, organising workload to establish measurable results, objectives and milestones for self and others.	✓	

Effectively manage wide network of contacts in line with performance objectives		
Customer Service – Works and collaborates with others effectively, is able to identify needs and deliver workable solutions, manages expectations, negotiates accordingly, modifies individual approach to different situations.	✓	
Learning/Improving – proactively seeks information, learns from mistakes and promotes constructive feedback	✓	
Analysis and use of evidence – gathers the relevant information, presents evidence concisely and makes rational judgements	✓	
Effective working productively under pressure, adapts and accepts changing circumstances	✓	
Commercial awareness with an aptitude to develop entrepreneurial activity for delivery of results and added value	✓	
Acts with high integrity, defends equal opportunities and leads by example to uphold organisational ethics and values	✓	
Highly experienced in using digital platforms with strong IT skills, e.g. Microsoft Office/365.	✓	
Welsh Speaker is always highly desirable and can be essential in some circumstances, subject to existing resource capability at that time. <i>(NB: Each vacancy will specify if highly desirable or essential and applications will be considered on a case-by-case basis.)</i>		✓
Valid UK driving license and use of appropriately insured vehicle, with valid MOT(where appropriate), to travel in region on a regular basis to fulfil duties, e.g., attending events, meetings. (Evidence required)	✓	
Satisfactory Disclosure Barring Service (DBS) check. <i>(NB: Offers of employment are conditional on a satisfactory DBS check, undertaken upon acceptance of employment.)</i>	✓	