

Job Description Template for RELATIONSHIP MANAGER

Job Title: Relationship Manager

Industry: [Insert Industry – e.g., BFSI, ITeS, Healthcare, etc.]

Location: [Insert Location]

Salary Range: [Insert Salary]

Department: [Insert Department]

Work Hour Allocation: [Insert Details]

POSITION OVERVIEW

We are looking for a Relationship Manager to maintain and grow customer relationships, identify business opportunities, and offer tailored financial or service solutions. This role emphasizes trust-building, proactive service, and client engagement.

ABOUT THE ORGANIZATION

[Insert Company Name] is a [Insert Industry-Specific Description] organization that prioritizes long-term client relationships and consultative engagement strategies to deliver value and satisfaction.

Level of Experience / Expertise Requirements

(Use as per requirement)

Entry Level (0–2 years): Assist with client onboarding, data updates, and service queries.

Mid-Level (3–5 years): Manage assigned portfolios, provide financial or service advice, and resolve client concerns.

Senior Level (6+ years): Develop relationship strategies, manage high-value clients, and support business growth initiatives.

JOB PROFILE SPECIFIC QUALIFICATION

(Add more if required)

- Bachelor's degree in Business, Finance, or related field
- Strong interpersonal and communication skills
- Familiarity with CRM systems and service frameworks

ROLES AND RESPONSIBILITIES

(Use as per level of expertise you require)

- Assist in opening new accounts and providing product information (Entry Level)
- Maintain client databases and service logs (Entry Level)
- Handle inquiries, service requests, and follow-ups (Mid-Level)
- Cross-sell relevant services and meet retention KPIs (Mid-Level)
- Track client satisfaction and resolve escalations (Mid-Level)
- Build client trust through regular reviews and relationship mapping (Senior Level)
- Identify upselling and business expansion opportunities (Senior Level)
- Mentor junior team members on relationship management (Senior Level)

Skills Required (Technical + Behavioral):

- Customer engagement and relationship building
- Communication and persuasion
- Service orientation and conflict resolution
- CRM and reporting skills
- Professionalism and proactive mindset

ABOUT PMAPS

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