
JOB DESCRIPTION

Job title: Corporate Client Adviser

Grade: D

Department: Client Relations

Overview

To work with multinationals/ large corporations and make a positive impact on their corporate responsibility, corporate giving and employee engagement through the use of CAF's advice led approach and promotion of services/products.

The role is critical in contributing to CAF's ambition to inspire the corporate sector to adopt Responsible Business practices through corporate and employee giving. Ultimately to build strong, dynamic, long term client relationships, understand their individual needs, and effectively introduce and promote services and products to meeting their ongoing ambitions and requirements.

The role will seek to combine existing business development and account management experience/ skills with a more consultative approach to enable Advisers to provide expertise and advice to clients in relation to corporate and employee giving and support the growth of CAF's client base from both existing and new clients to achieve key Corporate Client KPIs

Responsible to: Senior Corporate Client Adviser

Budgetary responsibilities: None

Responsible for (staff/jobs): Option based on experience

Job Responsibilities

- To provide advice led approach to business development and account management. Harness own experience, CAF knowledge/expertise, and deep sector understanding to support clients with corporate and employee giving requirements.
- To execute business development and key account management led campaigns to drive existing account growth and new client acquisition (supported by Business Development Team and Senior Managers).
- To proactively promote and increase the take up of the range of services that CAF offers to existing and potential new corporate clients, achieving ambitious KPIs.
- Proactively build reputation/ profile and industry sector credibility/ standing through client work, promotion of CAF work, business development activity, showcasing success and contributing to the external responsible business and employee engagement debates and discussions.
- To be accountable for maintaining and developing a sales and service relationship with a portfolio of clients undertaking regular review meetings to assess service delivery improvements and business development opportunities. Ensure client satisfaction through frequent touch points and feedback.
- To develop deep knowledge of corporate responsibility trends relating to industry sectors and companies including event attendance, reading relevant material and training. Keep up to date on

developments and actively apply these into advice led approach, business development and client support.

- To develop detailed knowledge of CAF's services for companies and develop knowledge of other services offered across CAF (including advisory, social investment, grant-making and grant-making as offered by our in-house Impact Accelerator).
- To advise and respond to complex proposals from, companies in respect of developing all aspects of their corporate and employee giving programmes.
- To actively participate and / or lead on team related projects including sector wide campaigns, knowledge sharing and cascading relevant client work.
- To attend events / conferences / workshops as part of strategy to raise CAF profile and acquire learning; network and increase industry and sector knowledge.
- To maintain up to date and accurate records of client contact and achievements, tracking and reviewing client performance and proactively taking any necessary action to increase business and improve service delivery.
- To maintain general market awareness and personal skills development as required by post.
- To manage internal data to assess opportunity and potential for product and service growth.
- To maintain up-to-date and accurate records of programmes and campaigns, including tracking performance of clients, proactively taking any necessary action to increase business and improve service delivery.
- To establish and embed benchmarking techniques to identify areas of improvement within CAF products and services, including standardised and smart ways of working across the team that delivers results, and collecting feedback from key clients to improve the way we promote and manage the service.
- To contribute and be part of a strong team culture committed to individual leadership, accountability, collaboration, flexibility, and motivation to succeed
- Awareness of and adherence to all relevant compliance policies and procedures, such as anti-money laundering and data protection.

CAF Values and Behavioural Indicators

The CAF Values and Behavioural Indicators set out in a transparent and consistent manner the explanation of the performance expectations of all CAF People. Through the use of common language and common standard, it combines a set of behaviours with the required technical skills and knowledge needed to effectively perform in any given role in CAF. This is used for the assessment, management and development of performance of all our people across CAF

Please refer to the link: [CAF values and indicative behaviours](#) for the CAF Values and Behavioural Indicators.

Dated: July 2026

PERSON SPECIFICATION

Job title: Corporate Client Adviser

Date: July 2026

Attributes *	Essential ✓	Desirable ✓	How Evidenced
Experience Proven track record of generating business growth Proven track record of working with, and managing, sales/client relationship management teams Proven track record or working with multinationals to adopt new practices / strategies and programmes of work	✓ ✓ ✓		A/C A/C A/C
Qualifications Degree level qualification or equivalent Vocational/ professional qualifications relevant to role		✓ ✓	A/E A/E
Training Sales training/coaching Consultative selling		✓ ✓	A/C A/C
Specialist Skills/ Ability/Knowledge Adept sales and client engagement skills Proven ability in relational/ advice led selling Excellent knowledge and ability of formulating and delivering business development/account management strategies/plans Ability to direct and coordinate with team to deliver sales/account management,, rolling out initiatives, customised client initiatives Ability to analyse data and horizon scan to identify trends and opportunities Ability to be a self starter and learner to develop giving and corporate responsibility expertise Ability to be a committed team player/ contributor with an ability to share in a common purpose and support/ motivate others Staff coaching and development Computer literacy	✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓		A/C/T A/C/T A/C/T A/C/T A/C/T A/C/T A/C/T A/C/T A/C/T
Communication Excellent verbal and written communications to all levels Excellent presentation skills to small and larger groups	✓ ✓		A/C/T A/C/T
Personal Qualities Highly organised with strong project management skills Good leadership and motivational skills Adaptable and able to adopt new ideas and approaches Self starter able to work independently and in a collaborative environment Ability to motivate colleagues to meet challenging business targets Able to take initiative and effectively engage stakeholders at all levels Be adaptable and flexible Proactive/ highly motivated Personal drive to exceed targets Demonstrate a positive attitude with ability to motivate self and develop client relationships Team player	✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓		C C C C C C C C C C C

Special Conditions Additional hours as required Willingness to travel throughout the UK, with the potential for occasional overseas travel	✓ ✓		C C
Prior to Appointment All posts: • Credit Check • Dow Jones Check • Basic DBS Check • Employment References • Medical Clearance • Right to Work in the UK	✓ ✓ ✓ ✓ ✓ ✓		R/E

Key

R = References, E = Evidence/Certificates, A = Application, C = Competency Interview, T = Testing/Assessment