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## JOB DESCRIPTION

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**Job title:** Corporate Client Executive

**Grade:** C

**Department:** Corporate Clients

**Main purpose of job:**

- To provide proactive client management to our key clients and Senior/Corporate Advisers
- To provide a dedicated point of contact for our key clients delivering a quality client service delivery function
- To increase the value and impact of funds into the charitable sector

**Responsible to:** Senior Corporate Adviser

**Budgetary responsibilities:** None

**Responsible for (staff/jobs):** None

**Key job responsibilities:**

- A dedicated account support for CAF's key corporate clients, responsible for providing proactive client management
- Responsible for client enquiries and accountable for servicing relationships with CAF's key corporate clients through regular telephone and email contact, attending in person meetings as required
- Strengthen and maintain existing corporate client relationships through quality service and meeting client needs
- Contribute to CAF's revenue generation through the retention and expansion of existing accounts through supporting the Senior/Corporate Advisers in the promotion of CAF's services, monitoring of accounts, identification of cross-selling opportunities and identification of inactive accounts
- Contribute to CAF's income generation through supporting Senior/Corporate Advisers to develop business in priority sectors
- Act as a key liaison point between key clients, the Senior/Corporate Advisers and service delivery departments across CAF, using the agreed business processes and service level agreements, in order to deliver a high-quality service to CAF clients
- Ensure adherence to service level agreements, proactive, quick and efficient client issue resolution, resulting in a high level of client satisfaction
- Identify and recommend ongoing opportunities to improve client service within the department and implement accordingly

- Develop detailed knowledge of CAF's corporate services & a sound understanding of other services offered across CAF
- Provide proactive support for Senior Corporate Advisers and Corporate advisers, with the ability to act up in terms of client management at times of absence
- Maintain up to date and accurate records of client contact and achievements, tracking and reviewing client performance and proactively reporting on any necessary action to update/improve service delivery
- Assist the Corporate Client team with monitoring overall client account activity and delivery against team key performance indicators
- Ensure adherence to Corporate Client team's workflow process
- Set up new contracts, contract renewals and coordinate client migration activity in order to provide a quality service to our clients
- Awareness of and adherence to all relevant compliance policies and procedures, such as anti-money laundering and data protection
- Proactively contribute to the overall achievement of the Corporate Client team in terms of achieving key performance indicators, supporting the team's performance management system and exhibiting positive and professional behaviour
- Ability to grow existing networks, and confidently represent CAF and the Corporate Client team at internal / external events
- Manage systems and reporting on an ad-hoc basis to support the team management, monitoring, trend analysis and delivery against KPIs
- Provide support in relation to internal governance, procedure and processes including but not limited to customer feedback, supplier due diligence, and risk register.
- On occasion, provide monthly reports and analysis of KPIs highlighting performance against business goals
- On occasion, analyse management information and raw data to provide reports on income, clients and any other relevant information as required to identify strategic business development opportunities
- On occasion, manage administration of staff inductions within the teams, liaising with internal departments

### **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:** September 2025

## PERSON SPECIFICATION

**Job title:** Corporate Client Executive

**Date:** September 2025

Attributes	Essential ✓	Desirable ✓	How Evidenced <sup>†</sup>
<b>Experience</b> <ul style="list-style-type: none"> <li>Client Management experience</li> <li>Account Management experience with FTSE 100 companies or equivalent</li> <li>Customer Service experience</li> </ul>	✓	✓ ✓	A/C
<b>Qualifications</b> <ul style="list-style-type: none"> <li>High standard of numeracy and literacy</li> <li>Degree or equivalent</li> </ul>	✓	✓	A/E
<b>Training</b> <ul style="list-style-type: none"> <li>Time Management</li> <li>Customer Service</li> <li>Presentation Skills</li> </ul>		✓ ✓ ✓	A/E
<b>Specialist Skills/ Ability/Knowledge</b> <ul style="list-style-type: none"> <li>Basic understanding of business development and account management objectives</li> <li>Ability to research &amp; investigate trends and put together detailed activity reports for clients.</li> <li>Experience/knowledge of responsible business / corporate responsibility, corporate giving</li> <li>Experience/knowledge of working in the voluntary sector</li> <li>Computer literate</li> <li>Working knowledge of MS Office</li> </ul>	✓ ✓   ✓ ✓	✓ ✓	A/C/T
<b>Communication</b> <ul style="list-style-type: none"> <li>Articulate – able to communicate with clients at all levels</li> <li>Ability to work successfully in a team environment</li> <li>Good interpersonal skills and customer awareness</li> <li>Presentation skills</li> <li>Complaint management skills</li> </ul>	✓ ✓ ✓ ✓ ✓		A/C/T
<b>Personal Qualities</b> <ul style="list-style-type: none"> <li>Flexible</li> <li>Organised</li> <li>Proactive</li> <li>Personal driver to exceed targets</li> <li>Self motivated</li> <li>Team worker</li> </ul>	✓ ✓ ✓ ✓ ✓ ✓		A/C
<b>Special Conditions</b> <ul style="list-style-type: none"> <li>Occasional unsociable hours</li> <li>Willingness to travel (UK)</li> </ul>	✓ ✓		C
<b>Prior to Appointment</b> All posts: <ul style="list-style-type: none"> <li>Credit Check</li> </ul>	✓		R/E

<ul style="list-style-type: none"> <li>• Dow Jones Check</li> <li>• Basic DBS Check</li> <li>• Employment References</li> <li>• Medical Clearance</li> <li>• Right to Work in the UK</li> </ul>	<ul style="list-style-type: none"> <li>✓</li> <li>✓</li> <li>✓</li> <li>✓</li> <li>✓</li> </ul>		
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**Key**

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