

YOUR GUIDE TO ›

# Business Relationship Manager



business banking @ CANADA'S CREDIT UNIONS

it's **WHO** you know.



# Business Relationship Manager



## Credit Unions Asked — CBOS Responded

CBOS — the Canadian Business Owner Strategy — and *CUSOURCE* Credit Union Knowledge Network (*CUSOURCE* Knowledge Network) have created a new national career development program that will help credit unions attract, develop, and retain commercial lending talent, or more specifically, Business Relationship Managers, from within the credit union system.

The CBOS HR Committee, comprised of business lending and HR professionals from across the country, worked together to build a career development program based on the important combination of relationship management and account management to create a position that is essential for serving Canadian business owners today — a full-service **Business Relationship Manager**.

## First of Its Kind for the Canadian Credit Union System

The Business Relationship Manager Career Development Program is a first of its kind. Its goal is to help the credit union system gain and maintain competitive advantage in the financial services industry.

The program offers a consistent standard of learning and development, yet is flexible and adaptable to all credit unions, regardless of size or location.

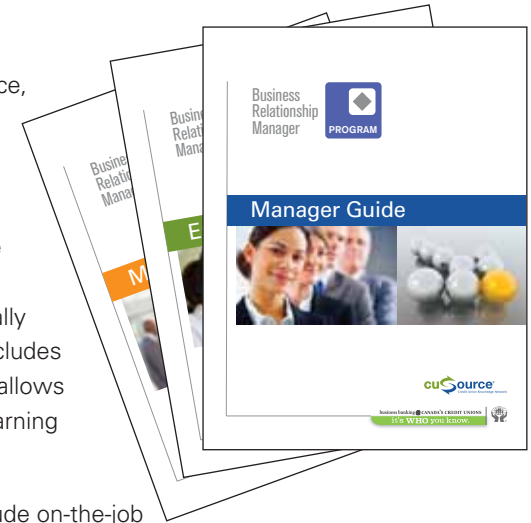
# Business Relationship Manager Career Development Program

The program is divided into four components — education, experience, exposure and mentorship.

Drawing from a detailed job profile for a Business Relationship Manager, the program contains five learner roadmaps based on the background of the individuals typically recruited for this position. It also includes an additional generic roadmap that allows credit unions to pick and choose learning as needed.

These development roadmaps include on-the-job learning, instructor-led training and on-line learning available from *CUSOURCE* Knowledge Network as well as other learning institutions.

The program also includes three guides: a Manager Guide, an Employee Guide, and a Mentor Guide, as well as a set of Appendices that are customizable to each credit union's needs. The Appendices consist of an orientation checklist, a sample job description, a general program outline and five learner roadmaps. Credit unions will be able to access the documents via the CBOS website or through the *CUSOURCE*® Learning Management System (LMS).



a roadmap for career development

[www.bizwyk.com](http://www.bizwyk.com)

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We wish to acknowledge and thank the CBOS HR Committee members for their contribution towards the development of the Business Relationship Manager Career Development Program.

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**[www.bizwyk.com](http://www.bizwyk.com)**

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