

Job Description



Job Title	Business Savings Development Manager	
Date & Version	September 2026	Version: 2.0
Reports to:	Community and Relationships Manager	
Direct Reports:	None	
Produced by:	Customer and Community Director	



Head Office



Full time, permanent



35 hours

Job, purpose and scope

This role is pivotal in positioning Leek Building Society as a trusted savings partner within our local business communities. The role is responsible for driving lead generation, acquiring new business savings relationships, and managing business accounts to ensure long-term retention and balance growth.

The role holder will play a key part in building relationships within the business communities in Leek and the surrounding areas, guiding corporate customers through the onboarding process and support them throughout the full life cycle of their account.

Duties and key responsibilities

Drive Business Growth and Lead Generation

- Proactively identify, generate, and convert leads using internal and external data sources, networking, partnerships and targeted outreach
- Build and maintain strong relationships with local businesses, community partners, networks and organisations to promote Leek Building Society and attract new business savings customers
- Develop and maintain a detailed understanding of the business savings market and Leek Building Society's product range, ensuring expert knowledge of regulatory requirements for onboarding and ongoing due diligence and compliance
- Maintain a measurable sales pipeline, reporting on activity, conversion rates and balance growth

Duties and key responsibilities

Relationship Management

- Act as the primary relationship manager for business and SME savings customers
- Build long-term, trusted partnerships with key businesses to maximise retention
- Manage the onboarding of new business customers, ensuring a seamless and compliant customer journey
- Conduct regular reviews with business customers to identify additional deposit opportunities, providing support and an excellent customer experience throughout the full customer lifecycle
- Resolve escalated queries or service issues promptly and professionally

Community Engagement and Brand Promotion

- Design, lead, and participate in business and community events, forums, and initiatives to enhance the Society's presence and reputation
- Represent the Society at networking events, conferences, and community activities, strengthening brand awareness and supporting the Society's strategic purpose

Stakeholder Collaboration and Internal Development

- Act as a subject matter expert on business savings products within the Society
- Work closely with the branch leadership team and other internal stakeholders to develop branch knowledge, skills, and lead generation activities
- Collaborate with the Marketing team to design targeted campaigns and align external communications with business development objectives
- Provide feedback on product design and competitor activity to inform product proposition
- Partner with Risk and Compliance teams to ensure adherence to regulatory requirements

Conduct Obligations

Conduct Rules

All employees and NEDs are expected to act in accordance with the PRA and FCA Conduct Rules:

- You must act with integrity
- You must act with due skill, care and diligence
- You must be open and co-operative with the FCA, the PRA and other regulators
- You must pay due regard to the interests of customers and treat them fairly
- You must observe proper standards of market conduct
- You must act to deliver good outcomes for retail customers

Financial Crime

All employees and NEDs are expected to:

- Be aware of their personal legal obligations and the legal obligations of the Society in relation to Financial Crime
- Be aware of the Society's Anti-Money Laundering systems and controls and follow the Society's procedures
- Be alert for anything suspicious in respect of money laundering or fraud and report any suspicions in line with internal procedures
- Do not discuss any suspicions with anyone outside of the Society and do not 'tip off' a customer or prejudice an investigation

Person Specification

Qualifications and knowledge	• Understand the competitive landscape of UK business banking, understanding business entities and structures, and the reasons why business customers look for, and switch to, alternative banking and savings providers • Financial services regulatory knowledge: Anti-Money Laundering, GDPR, Consumer Duty, BCOBS (training provided)
Experience	▪ Effective relationship management in a B2B environment within the financial services sector ▪ Proven track record in business development and lead generation within financial services, ideally savings, deposits, or SME banking ▪ Working in an environment requiring compliance to FCA regulatory and codes of conduct ▪ Ability to build and maintain professional networking
Skills and abilities	▪ Ability to generate and convert sales opportunities in a regulated financial services environment. ▪ Promote the benefits of all available sales channels with an ability to support customers through their journey of each one ▪ Excellent communications skills which can be adapted to varying scenarios from one-to-one contact to presenting at networking events ▪ A structured approach to relationship management to ensure the right level and frequency of contact with businesses and SMEs
Other requirements	▪ Clear understanding of 'Knowing Your Business' due diligence and AML requirements and the ability to work with businesses to lead them through the onboarding process ▪ Interest and presence in the business community – ability to meet SME members both in branch and at their place of work / business ▪ Ability to attend events outside of traditional office hours

