

Relationship Manager

FF03 Sales and account management · ISCO-08 3322 · CBS 0311 Marketing, public relations, and sales consultants · seniority medior · Also known as: Client Relationship Manager, Customer Success Manager

Maintains an existing customer portfolio, reviews usage and satisfaction periodically, renews contracts, and spots opportunities to extend the service.

The relationship manager works with customers who already buy and is tasked with retention, renewal and expansion inside that portfolio. Unlike an account executive or business developer, this role is measured on retention and customer value rather than new logos. Selection often looks for a seller, while the role stands or falls on following up agreements and raising renewals in good time, well before the customer starts comparing.

Key figures for this profile

27 skills · 8 competencies to measure · 6 knockout skills · centre of gravity: Business operations, commerce and entrepreneurship 46%, Communication and influence 29%, Self-management, drive and resilience 14%

1 Competencies to measure

These are the behavioural and ability constructs in this profile. Each one shows which hrmforce questionnaire measures it.

Competencies to measure	Target level	hrmforce instrument	Assessment method	Behavioural anchor at target level
Persuasiveness Competency (50-framework): Persuasiveness Knockout	 N4	Big Fifty, Competency Check, 360 Feedback	Assessment centre	Chooses per counterpart the argument that matches their interest and checks along the way whether the agreement is genuine.

Competencies to measure	Target level	hrmforce instrument	Assessment method	Behavioural anchor at target level
Client focus Competency (50-framework): Customer Focus Knockout		Big Fifty, Competency Check, 360 Feedback	360-degree feedback	Uncovers the real need behind a client question, makes a fitting proposal and checks after delivery whether it works.
Result orientation Competency (50-framework): Results-Orientation		Big Fifty, Competency Check, 360 Feedback	Personality questionnaire	Translates an assignment into measurable interim goals, measures progress and drops activities that do not contribute to the result.
Commercial capability Competency (50-framework): Commercial acumen Knockout		Big Fifty, Competency Check, 360 Feedback	Assessment centre	Discusses additional services with existing customers on own initiative and records the revenue opportunity in the customer file.
Listening and probing Competency (50-framework): Listen		Big Fifty, 360 Feedback	360-degree feedback	Summarises both the content and the feeling of the other party and probes until the real interest behind the request becomes visible.
Perseverance Competency (50-framework): Perseverance		Big Fifty, 15PF, Mental Resilience (4C)	Personality questionnaire	Keeps seeking alternative routes on a stalled case and involves others in that search on own initiative.
Market orientation Competency (50-framework): Market Orientation		Big Fifty, Competency Check, 360 Feedback	Assessment centre	Links signals from customers and competitors to the own offering and proposes adjustments on that basis.

Competencies to measure	Target level	hrmforce instrument	Assessment method	Behavioural anchor at target level
Recovery after setbacks Competency (50-framework): Stress resilience	 N3	Big Fifty, Mental Resilience (4C), 360 Feedback	Personality questionnaire	Analyses after a failed effort what went wrong, discusses it with those involved and starts a revised approach within a week.

2 Full skill profile

Every skill in this profile, sorted by weight. The behavioural anchor under each skill belongs to the target level.

T	Skill	Target level	Weight	Knockout	Assessment method	hrmforce instrument
V	relationship management Decides how the organisation maintains strategic relations, assigns ownership and assesses the value of the relationship portfolio.	 N5	5	no	Structured interview	Competency Check, 360 Feedback
G	Persuasiveness Chooses per counterpart the argument that matches their interest and checks along the way whether the agreement is genuine.	 N4	5	yes	Assessment centre	Big Fifty, Competency Check, 360 Feedback
G	Client focus Uncovers the real need behind a client question, makes a fitting proposal and checks after delivery whether it works.	 N4	5	yes	360-degree feedback	Big Fifty, Competency Check, 360 Feedback
G	Result orientation Translates an assignment into measurable interim goals, measures progress and drops activities that do not contribute to the result.	 N4	5	no	Personality questionnaire	Big Fifty, Competency Check, 360 Feedback

T	Skill	Target level	Weight	Knockout	Assessment method	hrmforce instrument
G	Commercial capability Discusses additional services with existing customers on own initiative and records the revenue opportunity in the customer file.	 N4	5	yes	Assessment centre	Big Fifty, Competency Check, 360 Feedback
V	Consultative selling Uncovers the underlying interests of several counterparts by probing and adjusts the proposal to these during the conversation.	 N4	5	yes	Assessment centre	Competency Check, 360 Feedback, Work sample test
V	Account management Independently carries out an account plan for an own customer portfolio and discusses results and plans with the customer yearly.	 N4	5	yes	Structured interview	Competency Check, 360 Feedback
V	Managing customer value and retention Analyses churn and customer value in the own portfolio and carries out targeted retention actions with measurable results.	 N4	5	yes	Work sample test	Work sample test, Knowledge test (client-specific)
V	Conversation management Chooses a fitting question type for each phase, summarises along the way and steers the conversation back to its goal when it drifts.	 N4	4	no	Assessment centre	Communication Styles, Competency Check

T	Skill	Target level	Weight	Knockout	Assessment method	hrmforce instrument
G	Listening and probing Summarises both the content and the feeling of the other party and probes until the real interest behind the request becomes visible.	 N4	4	no	360-degree feedback	Big Fifty, 360 Feedback
V	Negotiating Prepares a range and a fallback option beforehand, trades points of unequal weight and closes with written confirmation.	 N4	4	no	Assessment centre	Conflict Styles, Competency Check
V	Expectation management Records at the start what falls outside the assignment and discusses deviations with the client before they become visible.	 N4	4	no	Structured interview	Competency Check, Structured interview
V	networking Determines which contacts own work requires, actively establishes them and maintains them at regular intervals.	 N4	4	no	Structured interview	Big Fifty, Competency Check
G	Perseverance Keeps seeking alternative routes on a stalled case and involves others in that search on own initiative.	 N4	4	no	Personality questionnaire	Big Fifty, 15PF, Mental Resilience (4C)
V	Price negotiation Prepares a range and trading items for each negotiation and holds on to the agreed lower limit under pressure.	 N4	4	no	Assessment centre	Big Fifty, Competency Check, 360 Feedback

T	Skill	Target level	Weight	Knockout	Assessment method	hrmforce instrument
G	Market orientation Links signals from customers and competitors to the own offering and proposes adjustments on that basis.	 N4	4	no	Assessment centre	Big Fifty, Competency Check, 360 Feedback
V	Improving customer journey and experience Maps out the customer journey for a service, names the three largest bottlenecks and implements improvements with those involved.	 N4	4	no	Work sample test	Work sample test, 360 Feedback
V	Complaint handling Calms an angry client, separates emotion from facts and offers a solution with a deadline within own mandate.	 N3	4	no	Situational Judgement Test	Conflict Styles, Work sample test
V	Sales forecasting and pipeline management Substantiates the own monthly forecast with opportunity stages and historical conversion and explains deviations from the previous forecast.	 N3	4	no	Work sample test	Work sample test, Knowledge test (client-specific)
G	Recovery after setbacks Analyses after a failed effort what went wrong, discusses it with those involved and starts a revised approach within a week.	 N3	3	no	Personality questionnaire	Big Fifty, Mental Resilience (4C), 360 Feedback

T	Skill	Target level	Weight	Knockout	Assessment method	hrmforce instrument
V	Contracting and closing Recognises buying signals, names the remaining objection and puts a signable proposal on the table within own authority.	 N3	3	no	Work sample test	Competency Check, Work sample test
V	Value proposition development Develops a proposition for a target group using customer information and tests it in conversations with existing customers.	 N3	3	no	Work sample test	Work sample test, Competency Check
V	Time management and prioritising Ranks own work by urgency and importance, builds in buffer time and explains to others why an item will arrive later.	 N3	2	no	Work sample test	Competency Check, 360 Feedback
V	Reporting and dashboard building Fills an existing dashboard or report template with current figures and checks the display for errors.	 N2	2	no	Work sample test	Work sample test, Portfolio
V	Acquisition and lead generation Calls a supplied list of prospects following a fixed conversation outline and records the outcome for each contact.	 N2	2	no	Work sample test	Competency Check, Work sample test, 360 Feedback

T	Skill	Target level	Weight	Knockout	Assessment method	hrmforce instrument
V	Invoicing and accounts receivable Creates invoices according to the assignment data and checks address, amount and payment term before sending.		2	no	Work sample test	Work sample test, Knowledge test (client-specific)
K	Basic contract law knowledge Uses the standard agreement of the organisation and refers deviating clauses to a legal adviser.		1	no	Knowledge test	Knowledge test (client-specific)

3 Levels per seniority

The same profile with the job family seniority adjustment applied. Target levels are clamped to 1 to 5.

Skill	junior	medior	senior
relationship management	N5	N5	N5
Persuasiveness	N3	N4	N5
Client focus	N3	N4	N5
Result orientation	N3	N4	N5
Commercial capability	N3	N4	N5
Consultative selling	N3	N4	N5
Account management	N3	N4	N5
Managing customer value and retention	N4	N4	N4
Conversation management	N3	N4	N5
Listening and probing	N3	N4	N5
Negotiating	N3	N4	N5
Expectation management	N3	N4	N5
networking	N3	N4	N5
Perseverance	N3	N4	N5
Price negotiation	N3	N4	N5
Market orientation	N3	N4	N5
Improving customer journey and experience	N3	N4	N5
Complaint handling	N2	N3	N4
Sales forecasting and pipeline management	N2	N3	N4
Recovery after setbacks	N2	N3	N4
Contracting and closing	N2	N3	N4
Value proposition development	N2	N3	N4
Time management and prioritising	N2	N3	N4

Skill	junior	medior	senior
Reporting and dashboard building	N1	N2	N3
Acquisition and lead generation	N2	N2	N2
Invoicing and accounts receivable	N1	N2	N3
Basic contract law knowledge	N1	N2	N3

4 The proficiency scale

Level	Label	Autonomy	Complexity	Scope	Depth of knowledge
N1	Guided	works under supervision and follows instruction	routine, one variable at a time	own task	basic understanding of terminology
N2	Applying	works independently within set frameworks	familiar situations with limited variation	own role	working knowledge, applies standard approach
N3	Proficient	sets own approach and seeks input proactively	several variables, some ambiguity	own team or process	thorough knowledge, weighs alternatives
N4	Advanced	directs others and decides on the approach	complex, with conflicting interests	several teams or a department	in-depth knowledge, advises others
N5	Leading	sets the standard and the policy	strategic, under high uncertainty	organisation, value chain or profession	authority, advances the profession

5 Behavioural anchors per skill

Anchors sit at N1, N3 and N5. N2 and N4 are deliberately not anchored: raters interpolate between them, following the O*NET convention.

Skill	N1	N3	N5
relationship management Maintaining existing relationships with clients, colleagues or partners by planning contact moments, keeping agreements and picking up signals in good time.	Keeps contact details and agreements with relations up to date and responds to questions within the agreed time.	Plans contact moments for an own portfolio of relations, discusses satisfaction and starts improvement actions when signals appear.	Decides how the organisation maintains strategic relations, assigns ownership and assesses the value of the relationship portfolio.
Persuasiveness Moving others towards a position, decision or behaviour they initially resisted, using substantive arguments, examples and personal presence.	Puts forward an own proposal in a meeting and supports it with one concrete example from practice.	Chooses per counterpart the argument that matches their interest and checks along the way whether the agreement is genuine.	Wins board and external parties over to a far reaching change of course and sustains that support when resistance increases.

Skill	N1	N3	N5
Client focus Acting from the question and interest of the client, keeping agreements and visibly directing own work towards usefulness for that client.	Responds to client questions within the agreed term and refers on when the answer falls outside own task.	Uncovers the real need behind a client question, makes a fitting proposal and checks after delivery whether it works.	Translates client signals into changes in services and policy and holds the organisation accountable for the promised client experience.
Result orientation Directs own action at agreed results, keeps progress towards those results in view and chooses activities that bring the goal closer.	Finishes the assigned task within the stated norm and reports to the supervisor what has been achieved.	Translates an assignment into measurable interim goals, measures progress and drops activities that do not contribute to the result.	Sets the result agreements and performance measures for the organisation and upholds them when interests in play are conflicting.
Commercial capability Recognises opportunities for revenue and margin in contacts with customers and the market, and acts on them with offers and agreements.	Reports to the account manager which customer wish could lead to an additional assignment.	Discusses additional services with existing customers on own initiative and records the revenue opportunity in the customer file.	Sets the commercial course for the organisation, chooses which markets are served and accounts for those choices to the board.
Consultative selling Explores the question behind a customer question, links it to a fitting solution and substantiates the proposal with customer benefit.	Asks the prepared open questions in a sales conversation and summarises the customer need out loud.	Uncovers the underlying interests of several counterparts by probing and adjusts the proposal to these during the conversation.	Guides complex sales processes with several decision makers, designs the conversation method and trains colleagues in applying it.
Account management Maintains the relationship with assigned customers, plans contact moments, follows up agreements and ensures the customer interest lands inside the organisation.	Keeps customer contact details and agreements up to date in the system and reminds the account manager of open actions.	Independently carries out an account plan for an own customer portfolio and discusses results and plans with the customer yearly.	Determines the approach for strategic customers of the organisation and sits at board level to discuss multi year cooperation.
Managing customer value and retention Measures revenue, margin and churn per customer group and deploys actions to retain valuable customers and let them grow.	Signals customers who buy less than usual and reports this to the responsible colleague.	Analyses churn and customer value in the own portfolio and carries out targeted retention actions with measurable results.	Determines the retention policy of the organisation, sets standards for customer value and decides on investments in retention.

Skill	N1	N3	N5
Conversation management Opening, steering and closing a conversation purposefully by asking questions, summarising and making concrete agreements about what happens next.	Follows a prepared list of questions, asks them in the given order and records the agreements that were made.	Chooses a fitting question type for each phase, summarises along the way and steers the conversation back to its goal when it drifts.	Leads conversations with opposing interests at board level, develops conversation models for the organisation and tests them against practice.
Listening and probing Taking in the message of the other party fully, checking whether it is understood correctly and using targeted questions to surface underlying interests and assumptions.	Lets the other person finish speaking, takes notes and afterwards asks about anything that stayed unclear.	Summarises both the content and the feeling of the other party and probes until the real interest behind the request becomes visible.	Picks up sensitive signals in conversations with directors and supervisors and uses them to adjust organisational policy in good time.
Negotiating Reaching an agreement with one or more parties by exploring interests, using trade offs and consciously holding agreed limits.	Negotiates delivery time or price within fixed margins and refers any deviation to the manager.	Prepares a range and a fallback option beforehand, trades points of unequal weight and closes with written confirmation.	Leads negotiations on multi year contracts or employment terms, sets the mandate and defines the negotiating line for the organisation.
Expectation management Making clear in advance what the client will and will not get and when, and reporting in time as soon as that promise becomes unrealistic.	States the delivery time and conditions as recorded and reports any delay immediately to own manager.	Records at the start what falls outside the assignment and discusses deviations with the client before they become visible.	Sets service level agreements for the organisation, weighs feasibility against commercial interest and accounts for deviations to major clients.
networking Making new contacts inside and outside the organisation, showing mutual benefit and actively keeping the contact alive afterwards.	Introduces themselves to unknown participants at an event and records with whom they spoke.	Determines which contacts own work requires, actively establishes them and maintains them at regular intervals.	Builds a network across the profession and the value chain, brings parties together and uses it for the organisation's position.

Skill	N1	N3	N5
Perseverance Keeps working towards a goal when the work brings resistance, repetition or disappointing interim results, and looks for another route to the same goal.	Picks up a task again after a failed attempt once the supervisor shows how it can be done differently.	Keeps seeking alternative routes on a stalled case and involves others in that search on own initiative.	Keeps multi year programmes on course despite sustained opposition and holds the organisation to the chosen direction after setbacks.
Price negotiation Sets room and limits on price and conditions in advance, exchanges concessions during the conversation and closes within the own margin.	Follows the established price list and discount rules and refers deviating customer requests to the manager.	Prepares a range and trading items for each negotiation and holds on to the agreed lower limit under pressure.	Sets the pricing and discount policy of the organisation and personally negotiates the framework contracts with the largest parties.
Market orientation Follows what happens in the market, with customers and with competitors and includes that information in own choices and proposals.	Reads the customer newsletter and the sector news and raises striking signals during the team meeting.	Links signals from customers and competitors to the own offering and proposes adjustments on that basis.	Translates market developments into the strategic agenda of the organisation and repositions the offering for the longer term.
Improving customer journey and experience Maps the steps a customer goes through, measures where friction occurs and implements improvements in process and contact.	Records customer complaints and remarks in the agreed format and passes them on to the process owner.	Maps out the customer journey for a service, names the three largest bottlenecks and implements improvements with those involved.	Sets the standard for customer experience in the organisation and directs improvement programmes across departments.
Complaint handling Receiving a complaint, tracing its cause and reaching a solution that the client accepts and that prevents the error from recurring.	Records a complaint fully in the system, offers an apology and hands the file over according to procedure.	Calms an angry client, separates emotion from facts and offers a solution with a deadline within own mandate.	Handles escalated cases with legal or publicity risk and uses complaint analysis to change processes structurally.

Skill	N1	N3	N5
Sales forecasting and pipeline management Records ongoing sales opportunities by stage, estimates probability and revenue and translates this into a forecast for the coming period.	Updates the status of own sales opportunities in the customer system and reports which opportunities have lapsed.	Substantiates the own monthly forecast with opportunity stages and historical conversion and explains deviations from the previous forecast.	Sets up the forecasting method for the whole sales organisation and uses the outcomes for capacity and investment decisions.
Recovery after setbacks Resumes work shortly after a rejection, mistake or failed project, names what the setback teaches and adjusts the approach accordingly.	Starts again after a rejected result as soon as the supervisor has indicated what needs to change.	Analyses after a failed effort what went wrong, discusses it with those involved and starts a revised approach within a week.	Gets the organisation moving again after a major loss and organises that lessons from failures are structurally acted upon.
Contracting and closing Converts a verbal agreement into a valid offer and contract, clears remaining objections and gets the customer to sign.	Fills in a standard agreement with the agreed details and checks whether all annexes are present.	Recognises buying signals, names the remaining objection and puts a signable proposal on the table within own authority.	Designs the contract forms and mandates for the organisation and decides on exceptions in deals with major financial impact.
Value proposition development Formulates for a target group which problem the offering solves, what it delivers and how it differs from the alternatives.	Describes the features and benefits of an existing product in simple customer language following a fixed format.	Develops a proposition for a target group using customer information and tests it in conversations with existing customers.	Determines the proposition portfolio of the organisation, chooses which propositions are dropped and links them to the multi year strategy.
Time management and prioritising Allocates available time across tasks by urgency and importance, sets a sequence and adjusts it when new work arrives during the period.	Follows a task list provided by others and asks which task takes priority whenever new requests arrive.	Ranks own work by urgency and importance, builds in buffer time and explains to others why an item will arrive later.	Sets prioritisation agreements and planning standards across the organisation and decides which work streams receive time and capacity when both are scarce.
Reporting and dashboard building Builds recurring reports and dashboards that show the right indicators for an agreed audience and keeps their definitions up to date.	Fills an existing dashboard or report template with current figures and checks the display for errors.	Designs a dashboard together with the user, chooses indicators and definitions and processes user feedback into new versions.	Determines which management information the organisation uses and keeps definitions unambiguous across all reporting.

Skill	N1	N3	N5
Acquisition and lead generation Finds and approaches new customers through network, telephone, email and online channels, and turns interest into a concrete conversation.	Calls a supplied list of prospects following a fixed conversation outline and records the outcome for each contact.	Builds an own prospect list from market and network information and books new first conversations with it every week.	Develops the acquisition approach for the whole organisation, chooses channels and messages and tests these against achieved conversion.
Invoicing and accounts receivable Creates and sends invoices, follows up outstanding items and takes steps on late payment up to handover to debt collection.	Creates invoices according to the assignment data and checks address, amount and payment term before sending.	Manages the outstanding items, follows up arrears by telephone and agrees payment schemes within the established policy.	Sets the credit and dunning policy of the organisation and decides on write offs and further legal steps.
Basic contract law knowledge Knows the main rules on offer, acceptance, breach of contract and general terms and recognises when legal advice is needed.	Uses the standard agreement of the organisation and refers deviating clauses to a legal adviser.	Assesses contracts on liability, termination and payment and proposes amendments within the own mandate.	Sets the contract templates and legal frameworks of the organisation and decides on deviations with major risk.

6 Assessment methods and validity

The validities are the corrected meta-analytic estimates from Sackett, Zhang, Berry and Lievens (2022) in the Journal of Applied Psychology, which replace the older Schmidt and Hunter (1998) figures. The spread matters as much as the mean: with a high SD, validity varies strongly by context.

Assessment method	rho	SD	What it is
Structured interview	0.42	0.19	Behaviour-based interview with fixed questions and a rating scale per question.
Assessment centre	0.29	0.09	Multiple exercises, multiple assessors, dimension-wise scoring.
360-degree feedback	-	-	Multiple raters around the person rate behaviour against behavioural anchors.
Personality questionnaire	0.40	0.15	Self-report of behavioural preferences. At hrnforce the Big Fifty and the 15PF.
Work sample test	0.33	0.09	The candidate performs a representative work sample under standardised conditions.
Situational Judgement Test	0.12	0.11	Scenario with response options, scored on knowledge or behavioural tendency.
Knowledge test	0.40	0.13	Test of declarative job knowledge, usually assembled per client.

7 Assessment instruments for this job

hrnforce instrument	Skills	What it measures
Competency Check	17	Behavioral-Level Competency Assessment
360 Feedback	14	Multiple assessments based on behavioral anchors
Big Fifty	10	Personality questionnaire, 150 items, 25 factors
Work sample test	10	Representative work sample under standardized conditions
Knowledge test (client-specific)	4	Professional knowledge test, customized for each client
Conflict Styles	2	Preferred style in conflict situations
Mental Resilience (4C)	2	Mental Resilience According to the 4C Model
Communication Styles	1	Preferred communication style

hrmforce instrument	Skills	What it measures
Structured interview	1	Behavioral interview with a fixed structure
15PF	1	Personality Profile, a shorter alternative to the Big Fifty
Portfolio	1	Evaluation of prior work against fixed criteria

8 How to use this profile

1. Agree the profile with the hiring manager before the first candidate is measured. Weights shifted afterwards make the outcome indefensible.
2. Choose the assessment method per skill from the Assessment method column. Combine at most three methods per candidate.
3. Calibrate the assessors in a two-hour session using the anchors in chapter 5. Anchors without rater training deliver little.
4. Fill in the match calculator and discuss the gaps in the development conversation. Type A and type G are selection criteria, not one-quarter development goals.

Source: hrmforce Skills Framework 2.0, version 2.0.0, built 2026-09-08. Crosswalks to ESCO v1.2.1, O*NET 31.0, Lightcast Open Skills, SFIA 9, DigComp 3.0, EntreComp, LifeComp, GreenComp, Allit, WEF Future of Jobs 2025, ISCO-08 and the Dutch CBS occupational classification BRC 2014 edition 2025. This profile is a starting point, not a standard: align it with your own organisation before selecting on it.