



Example of Client Services Associate Job Description

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Our company is growing rapidly and is looking to fill the role of client services associate. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

Responsibilities for client services associate

- Build an account plan for the account scope – with details of the relationships required, the opportunities that have to be chased, and the revenue expected from such opportunities, potential threats and weaknesses that need to be addressed
- Support pre-sales proposals for new business development outside of account scope
- Checks INFO/INSINQ inboxes to ensure completion and necessary follow up action
- Act as our clients' main point of contact within Conifer
- Responsible for coordination with Clients outside vendors
- Provide phone-based, email-based, remote-access based, and occasional face-to-face (walk-in) support with positive manner and good customer-facing skills
- Be accessible for support requests via phone ACD system, email, and ticketing system for designated shift according to established service levels
- Quickly and efficiently provide support for known (1st level) application usage and hardware support to end users, with prompt response and resolution within established service levels to such technical and operational problems
- Provide escalation and routing of the ticket to the appropriate IT group for resolution and follows up with escalated group and/or customer as needed to ensure that customer's issue is resolved completely in a timely fashion
- Maintain excellent customer service focus, review all communicated requests

Qualifications for client services associate

- Minimum one year experience handling inbound calls in a contact center
- NCFM/NISM certifications in capital markets, derivatives and currency derivatives
- High level of MS Excel skills required
- Familiar with Microsoft Windows suite of products (Excel and Word)
- Ability to accept change
- Proficient with 10-key by touch