Downloaded from <https://www.velvetjobs.com/job-descriptions/account-manager-client-service>

# Example of Account Manager Client Service Job Description

Our company is growing rapidly and is looking to fill the role of account manager client service. 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 account manager client service

* Establish schedule of service reviews with service delivery partners and conduct/run service reviews, and incorporate service metrics and client reporting as agreed with the client
* Involve RM in service review timing to ensure consistency in messaging to client
* Be responsible for follow through on service delivery issues emanating from service reviews
* Create and maintain “Paths to Green” for service functions operating below client expectations
* Log all client “Service Change Requests”
* Facilitate regular communication across all internal teams to support consistent service delivery
* Heighten awareness of service issues across IS and actively manage issues to provide a single face of the IS service delivery business
* Take a lead role in all service delivery initiatives
* Overall relationship health monitoring to forecast client “temperature” and facilitate regular discussion with Sales and
* Manage risk through close attention to client overdrafts, unpaid bills and, escalate risk related issues to appropriate parties as required

## Qualifications for account manager client service

* Bachelor's degree holder at least 4 years experience in customer service front office role, preferably with strong exposure to Commercial Banking/Corporate clients
* Relevant knowledge and experience will be considered in conjunction with related business degree, or industry recognized training (SIA, AFSA)
* Demonstrated experience in, exposure to and interest in global financial markets
* Demonstrated experience and exposure to plan sponsor, fund distributor, or investment manager client base
* Demonstrated experience and exposure to Collateral Management
* Minimum of 2 years sales experience in financial services in a relationship management role Banking Advisor or Financial Advisor