Downloaded from <https://www.velvetjobs.com/job-descriptions/client-relationship>

# Example of Client Relationship Job Description

Our company is growing rapidly and is looking to fill the role of client relationship. 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 relationship

* Prospecting, managing and retaining key clients
* Understanding the client's investment goals and objectives and developing a diversified investment plan and strategy to meet goals
* Advising clients with complex investment relationships on asset allocation and portfolio construction for strategic and tactical decisions
* Managing client service and administrative functions
* Typing of review reports, statement of advice reports and any other miscellaneous client letter
* Typing of review reports, statement of advice reports and any other miscellaneous client letters
* Qualify prospective clients via telephone, email and in person meetings
* Interacts with his/her contact points that might be both senior level procurement or finance directors, or their direct reports, travel managers or executive assistants
* Create strategies to align with GBT business strategy and meet P&L goals
* Assess risk and opportunity and develop strategies to defend or exploit potential impacts

## Qualifications for client relationship

* Maintain tight communication with Service Assistant to ensure all service requests are addressed in a timely fashion
* Advanced analytical and problem solving skills the ability to understand and think analytically about complex business problems
* Advanced ability to work in a team environment, by soliciting input and feedback
* Must be able to help in the physical installation of equipment
* Leverage the Business Review as a consultative tool to demonstrate performance against plan
* Use value proposition to create interest for key contacts, open the door to new relationships within the organization and continually reposition value with ongoing contacts