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# Example of Client Services Specialist Job Description

Our company is looking to fill the role of client services specialist. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for client services specialist

* Provide Risk Management with custom reports based on specific information that needs to be conveyed
* Review reports to verify accuracy and identify problem areas
* CS Specialists review relatively complex legal documentation required to appropriately administer a variety of specialized situations on client name accounts
* CS Specialists review all transactional requests on above mentioned specialized situations & subsequently provide direction to process or follow up if not in good order (NIGO)
* CS Specialists also respond to ad-hoc questions from internal and external clients relating to specialized situations
* CS Specialists also need to research any unique situations that arise using a variety of internal and external information, provide recommendations to leaders on how to progress and assist with documentation
* Communicate with the owner on a daily basis to keep them apprised of the status of the CIP Program, any issues with Claims Orientation & Safety which is handled by another Broker sub-consultant, and Contactor Drug Testing & Background Checks which are handled by the owner’s sub-consultant
* Maintaining internal policy detail and premium billing & collection system for clients
* Proactively investigate lease transaction needs during the lease cycle
* Continually monitor the transaction for compliance with policies and procedures and coordinate necessary approvals and actions throughout the process

## Qualifications for client services specialist

* Demonstrated experience handling technical support and customer service call, email, and chat transactions
* Ability to function at a high level within a team environment while self-motivating independently
* 1 – 3 years of experience in technical helpdesks troubleshooting email systems and clients, cloud, and document services
* Must have the ability to take initiative and work in a fast-paced environment while balancing multiple demands, addressing shifting priorities, and maintaining focus
* Demonstrate an ability to manage a broad range of issues and critical situations
* Triage issues through impact assessment and initial investigation