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# Example of Client Services Specialist Job Description

Our company is looking for a client services specialist. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

## Responsibilities for client services specialist

* Work directly with customers and vendors to execute transactions, resolve issues and provide a high level of customer satisfaction
* Work with the customer and sales staff to manage activities associated with lease termination which include the preparation of accurate payoff quotes, transfer of equipment and/or the coordinated return of equipment
* Accurately enter data in to applicable internal account systems
* Proactively investigate lease transactions needs during the lease cycle
* Continually monitor the transaction for compliance with policies and procedures
* Coordinate necessary approvals and actions throughout the process
* Through instruction, learn to accurately prepare (by equipment cost and location) detailed documentation related to the installation of equipment associated with specific lease transactions
* Renewal strategy and negotiation
* Analysis of financial claims and utilization data
* Identify opportunities to engage local, regional, and national subject matter experts and coordinate delivery of expertise to clients

## Qualifications for client services specialist

* Troubleshoot and/or escalate issues to a resolution
* A willingness to continue to learn and adapt in the role
* Work experience at a Financial institution is preferred
* Estates & Trusts Administration Designation is preferred
* IFIC Sales/ Operations or CSC designation is preferred
* Bilingual in both French and English is preferred