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# Example of Director, Client Management Job Description

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

## Responsibilities for director, client management

* Function as the primary liaison between Optum and your assigned client base using a consultative approach to manage the account and exceed all client needs
* Manage, test and deliver quality client output, including but not limited to account statements, confirms, checks
* Provide effective leadership to direct reports, including performance management practices through individual performance plans, annual reviews, regular one on one meetings and feedback sessions, ongoing coaching and development
* Responsible for the successful testing and execution of the annual tax process
* Client Management and Retention - Develops strategies to ensure client retention, satisfaction and quality
* Manage units’ performance to maximize growth and persistency
* Act as the primary technical advisor to associates on all group insurance issues
* Review and sign-off on all agreements and/or documents (fee agreements)
* Actively participate as a member of the Management Committee for the St
* Deliver a high Promotion and Causal Retail (PCR) client retention rate in Europe, NA and Asia

## Qualifications for director, client management

* Solid understanding of data strategy and data management practices – specifically client data
* Strong understanding of KYC regulations, policies and processes
* Demonstrate expertise in fixed income markets and products
* Understand portfolio construction and analyze performance
* 10+ years of experience with Minimum of five years' experience in a client facing role in Sales or Consulting within the banking or financial services industry
* Strong fluency English and Chinese (Mandarin), written and verbal