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# Example of Service Representative Job Description

Our company is growing rapidly and is hiring for a service representative. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

## Responsibilities for service representative

* Documents calls, written communications, made in an attempt to gather, or upon gathering the missing information needed to process the paperwork
* Responds to inquiries or complaints received through phone calls or written correspondence concerning client accounts
* Conducts basic diagnoses of internet software/hardware to troubleshoot client connectivity problems
* Documents, in detail, client communications in the call tracking system and accurately updates client personal information as appropriate
* Researches, resolves and makes decisions regarding various inquiries for clients, Financial Advisors (FA’s) and associates within RJA and RJF
* Determines best method to resolve problems to ensure customer satisfaction while adhering to company policies
* Advises Compliance or Sales Management of potential branch or client issues
* Analyze cases for and determine level of complexity of the request
* Contact the appropriate resource to assist in resolving the request
* Accurately issue and endorse policies (including renewals and endorsements)

## Qualifications for service representative

* Able to work independently within operational guidelines
* Able to handle stressful situations and be sensitive to political climate
* Self-starter, diplomatic, and an effective problem solver, with high self-confidence and an outgoing personality
* High level of efficiency, accuracy and reliability
* Ability to operate as a team player and also use own initiative
* Can learn quickly and share knowledge and best practices across the business