



# Example of Client Development Job Description

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Our company is growing rapidly and is searching for experienced candidates for the position of client development. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for client development

- Provide strategic business and technical support to national/global Sales team for negotiating and closing contracts with client's key decision makers
- Understand and articulate business pain points and growth opportunities with executive level audiences
- Provide strategic thinking to solve a client's business problems and offer the right solution(s) to holistically address the need
- Explore new ways to leverage data to drive strategic opportunities and solve client business challenges
- Establish a single tracking source for all projects
- Identify project owners (CNVR, Dell & 3rd party when applicable)
- Provide regular status updates to all necessary stakeholders
- Document all existing data integrations especially data feeds (identify data feed owner for CNVR & Dell)
- Document all changes and circulate most up to date spec sheet identifying what the referenced integration entails
- Outline responsibilities for Client Support, Account Management, Client Integration (CIE) and Client Development

## Qualifications for client development

- 3-5 years of related experience and/or training with financial planning, sales, retirement plan services and investment and risk management knowledge
- Series 65 and IA state insurance license required

- Minimum of two years' experience in professional services marketing
- Strong SAS experience is preferred