



# Example of Client Service Administrator Job Description

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Our growing company is looking for a client service administrator. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

## Responsibilities for client service administrator

- Assist in maintaining complete and accurate records of activity and clients on the CRM
- Liaising with the Marketing Department in terms of data validation for presentations, factsheets, product descriptions and client reporting
- Working on client presentations, including getting sign-off from Compliance
- Supporting delivery of material and meetings eg printing, binding
- Reception cover duties and meeting servicing
- Supporting assembly of content for client review questionnaire
- Ad hoc sales support, where necessary
- Support for internal and external events from event planning and venue search to supporting event delivery on the day
- Deal with operational queries from both internal and external stakeholders, including, the wider Recoveries Management team, clients and suppliers
- Manage any UAT relating to the file processing and financial reconciliation

## Qualifications for client service administrator

- Knowledge of Datawire
- Knowledge of M2/Dynamics
- Knowledge of TASQWeb
- Experience in the financial industry an asset
- Use all material and technical resources available to perform required tasks

