



# Example of Client Service Analyst Job Description

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Our innovative and growing company is searching for experienced candidates for the position of client service analyst. If you are looking for an exciting place to work, please take a look at the list of qualifications below.

## Responsibilities for client service analyst

- Supporting the business development professionals on distribution effort by being a primary contact for client service
- Interfacing with multiple departments to synthesize information
- Establishing, maintaining, and optimizing relationships within various groups within the organization
- Handling the Request for Proposal Processes ("RFPs") making sure that the company answers all inquiries in a timely, accurate, and scalable manner
- Ensuring clients and prospects can access information in a broad set of institutional and retail databases to make the firm commercially successful
- Updating and further enhancing marketing and product materials (Factsheets, Profiles, Marketing Deck)
- Maintaining integrity, quality, and timeliness of content in various websites
- Assisting in the company's client / prospect email communication and event coordination process
- Proactively anticipating regular key client requests and ensure timely coordination and completion
- Managing the CSG mailbox

## Qualifications for client service analyst

- NASD Series 6 or 7 & 63 and Series 65 or 66 preferred
- Interacting with the Supervisor to ensure the team continuously improves the overall efficiency of the department

- Liaising with clients to ensure they are happy with the service provided and if there are any issues ensuring that they are escalated and resolved in a timely manner to the client's satisfaction
- Monitoring risk, ensuring escalation to management if required