



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

- Will set-up and participate in portfolio manager due diligence meetings
- Create and enhance reports to track and monitor department metrics and quality
- The CSR must report to the client account managers the status of all incident and queries reported on a regular basis and is a crucial partner of the account managers
- ****Beginning in May 2017, The position will be housed in the New York location supporting the Long Island/Queens markets****
- Analyze sales and other data by using proprietary syndicated tool to develop custom reports for clients that will help them with key retail optimization strategies under the direction from Sr
- Develop data-driven recommendations to 3-5 different consumer packaged goods clients at a time
- Identify client business questions, conducting training sessions and deliver presentations to clients on usage of subscription data source
- Provide guidance and direction to a small, growing team of analysts, helping them meet client challenges and supporting their growing analytic capabilities
- Responds to client request, acts as liaison between client and internal areas, to manage customer escalations and requests
- Contributes to project status and strategic planning meetings coordinates client enrollment/benefit fairs and participates in client driven audits and reviews and leads client driven projects and requests

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- The successful candidate will have a solid track record of demonstrating superior client service skills, strong verbal / written communication skills
 - Bachelor's degree required, Master's degree or work toward a master's preferred
 - Minimum of 5 years of experience within the investment/asset management industry and have a solid understanding of the needs of the Sub-Advisory marketplace
 - Should have solid background in equity, fixed income and alternatives investing
 - Preference given to candidates with a CFA designation, or currently working toward a CFA designation
 - This position requires a great deal of teamwork and the ability to communicate