



Example of Client Service Analyst Job Description

Powered by www.VelvetJobs.com

Our growing company is searching for experienced candidates for the position of client service analyst. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

Responsibilities for client service analyst

- Act as a Coach/Mentor to tier 1 agents
- Provide daily performance feedback to the tier 1 agents contribute input to agents' annual and semi-annual performance reviews
- Ensure best-in-class accurate and timely support when booking, reconciling and summarizing capital activity, and liaising across internal teams and external administrators
- Support all Investment Accounting activities related to our REIT Fund
- Work directly with Marketing, Accounting, Performance teams, Investment Centers, Sales & Service, both locally and globally
- Oversee project plans to ensure timely and accurate delivery for year-end processes such as PAs and annual pension statements adhoc projects
- Contributes to project status and participates in client driven audits and reviews and leads client driven projects and requests
- Assist in the analysis and research of mutual funds, primarily focused on fund performance and portfolio characteristics, such as attribution, holdings and sector weights
- Continuously maintain and update internal response database
- Compile information for institutional client reporting packages, including attribution, assets, holdings, performance and fund characteristics

Qualifications for client service analyst

- 3+ years of relevant experience in payments, ecommerce or mobile

- Investment knowledge, initiative, creativity, and persistence are important in this role
- Work independently collaboratively within a team environment as the Client Service Analyst will work closely with National Accounts to implement the business plan around each client/prospect
- Manage new work requests, work order changes and provide technical advice where appropriate
- Identify process improvement opportunities and best practice sharing (time to market and quality)