



Example of Client Service Job Description

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Our company is hiring for a client service. To join our growing team, please review the list of responsibilities and qualifications.

Responsibilities for client service

- Serve as liaison between the customer and various departments/vendors
- Assist with the set up of new accounts, maintain records, prepare reports, complete special assignments and related clerical duties
- Work closely with outside sales representatives to build and maintain relationships with customers by assisting with orders, pricing, terms, new leads, and problem solving
- Evaluates and recommends distribution channels for advertising programs
- Monitor competitors' marketing activities and techniques
- Formulates and executes strategic annual marketing plan to achieve firm objectives
- Plans, implements and oversees local advertising and promotion activities including print, online, electronic media, radio, television and direct mail
- Organizes, coordinates and attends all marketing events including, but not limited to, seminars, trade shows, tabling events, client appreciation events and dinners
- Contacts existing clients for advertising marketing events and building client referral and professional alliance databases
- Generates and maintains prospective client database for direct marketing projects

Qualifications for client service

- At least 3 to 5 years' experience in a financial planning, investment, insurance or banking office performing similar work

- A strong service background with 2 – 3 years of industry experience preferred
- Series 7 required and Series 63/65 or 66 required
- Ability to effectively multi-task and function in a high intensity environment
- Tech Savvy! Strong web-based navigation and Microsoft Office skills