Example of Client Services Specialist Job Description

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Our innovative and growing company is searching for experienced candidates for the position of client services specialist. 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 services specialist

- Add/renew policy record in EPIC
- Secure binder contingencies as directed by the brokers
- Lead policy issuance with Mumbai team
- Lead WillPLACE data input with Mumbai team
- WISDOM Model Reports
- Follow up on invoicing and accounting inquiries
- Managing the Level 2 Service Desk and incident management activities within PLVSC Operations
- Performing controlled escalation management to Business, Information Technology (IT) management and vendors
- Proactively monitoring and ensuring customer satisfaction and soliciting feedback for service improvement plans
- Acting as the main regional point of contact, within Finance Production Services for your business line

Qualifications for client services specialist

- Proficiency in Microsoft Office programs, including Excel a must
- Ability to service large and/or complex accounts (quota share, layered programs, large deductibles and retrospectively rated programs)
- Ability to service middle market clients in coordination with team leader
- Professional designation/certification GBA or PHR a plus

- Review proposals with clients and obtain Order to Bind