



Example of Customer Service Lead Job Description

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Our growing company is hiring for a customer service lead. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

Responsibilities for customer service lead

- Provide front-facing support for branch customers in a wide range of bank products and services, including safe deposit box management, merchant/vault and ATM processing, and foreign currency exchange
 - Provide access and information to customers about the many products and services East West Bank offers
 - Refer customers to Business Relationship Managers and/or Financial Consultants for needs assessment to cross-sell bank products
 - May assist Branch Manager in training customer service representatives to effectively identify quality referral opportunities and to provide ongoing training regarding sales campaigns, compliance and other bankwide communication as needed
 - Coach and mentor team members with a focus on professional development
 - Develop and lead end-to-end project plans and ensure on-time delivery of critical Success initiatives
 - Scale the Success team by capitalizing on opportunities for increased effectiveness and efficiency, driving productivity initiatives
 - Responsible to understand key external customer events such as POG timing, ad activity, and BTS (Back To School)
 - Attend weekly meetings to understand Sales and Marketing initiatives which impact external customers
 - Participate in external customer meetings including long term business planning meetings that provide account information
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- Ability to work in a fast paced, growth-oriented and time-critical environment
- An “expert” level must be present or achievable as defined by the supervisor in using interpersonal skills, communication skills - verbal and written
- A “solid” understanding of fractions and decimals
- An “expert” level regarding human relation skills - Works well with others, takes time to help customers and co-workers achieve their objectives and goals
- A strong attention to detail and multi-task skills is required
- Participate in customer site visits with the Sales Organization