



Example of Financial Services Consultant Job Description

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Our innovative and growing company is looking to fill the role of financial services consultant. Thank you in advance for taking a look at the list of responsibilities and qualifications. We look forward to reviewing your resume.

Responsibilities for financial services consultant

- Translate enterprise customer needs in high level solutions design
- Consult in the use of data and analytics to deliver value to the customer's business through engaging our Financial Services industry knowledge, experts and solutions
- Provide exceptional customer service to customers through office and phone appointments, responding to reviews, conducting chat appointments and answering transferred calls from call center
- Work collaboratively with customers to interpret, assess, and explain student accounts including working cooperatively with other contacts to resolve student account related issues
- Actively participate in all professional development activities such as trainings, project teams, and other opportunities
- Establish, maintain and manage key customer relationships (especially with executive and analytical contacts) in tandem with the Relationship Manager
- Supplement appropriate business case efforts that support solution development, providing voice of customer input prevailing industry trends/needs
- Working with a team to define a business solution that may include defining business architecture, process design and delivery activities whilst driving the development of improved capabilities
- Executing core consulting and project management activities such as gap analysis, requirements gathering, functional specifications, risk/issue

- Professional experience in a consulting or commercial environment, with good knowledge of and network in the Financial Services sector in Switzerland

Qualifications for financial services consultant

- Experience with insurance packages including Duck Creek and Guidewire
- Bachelor's Degree in a technical or systems field
- At least five (5) years of experience in a client environment – insurance or financial services clients preferred
- Experience of complex environments
- Proven track of successful delivery/participation of consulting projects for Financial Services clients
- Strong business/industry acumen