

Client Services Representative

Essential Duties:

Performs a variety of duties to successfully orchestrate the varied functions of the office, of which the following are illustrative:

- Greets customers immediately with a friendly and sincere welcome; serves as a focal point for all inquiries and provides personal attention to clients needs;
- Provides thorough and knowledgeable explanations of the companies products and services in order to maximize each sale and optimize client satisfaction;
- Answers telephone calls and provides sterling telephone service to clients;
- Completes the documentation and performs point-of-sale processing on all types of new accounts, e.g., loans, deposits, etc;
- Provides support to office client service personnel engaged in establishing quantitative client service and sales objectives on an annual basis as warranted (this activity to be integrated with the office's annual marketing/sales plan);
- Provides assistance, as requested, to office client service personnel involved in soliciting new business from present and prospective clients; Maintains ongoing business relationships with present clients in order to take advantage of additional cross-selling opportunities;
- Provides client service information on a timely basis in order that this information may be included as part of monthly and year-to-date performance reports;
- Maintains a thorough knowledge of the features and benefits of all company products and services in order to ascertain client needs and to participate in selling in conjunction with these needs;
- Provides direct service to clients with respect to company products and services; e.g., deposits, loans, trust and investment products, etc;
- Assists clients in obtaining specialized services from other company departments as necessary; Provides help to clients with specific inquiries or service problems;
- Prepares and scans all teller work per guidelines;
- Maintains an awareness of new business opportunities with clients;
- Actively refers clients to appropriate client service personnel as warranted when these opportunities are available.

Basic Qualifications:

A high school diploma or equivalent with an emphasis in a business curriculum.

Proficient reading, writing, grammar and mathematics skills.

Moderate computer skills.

Proficient interpersonal relations and communication skills.

A minimum of one (1) year experience in a customer service position required.

EOE