

Client Service Specialist

Job Title: Client Service Specialist
Department: Client Relations
Supervisor: Vice President of Operations

Client Service Specialists are responsible for utilizing problem-solving skills to address client requests and needs. They are also responsible for advocating for clients. Successful candidates are organized, adaptive, remain calm in stressful situations and maintain excellent follow-up skills.

Key Responsibilities:

- Client Advocacy
- Triage incoming calls and emails to ensure they are delivered appropriately
- Attentive and patient to customer needs
- Must learn and develop company product knowledge to become a subject matter expert (SME)
- Adapt to change and able to remain calm during stressful situations
- Ability to problem solve client request and needs
- Excellent follow up skills to any customer inquiry that is not immediately resolved
- Maintain and add notations into the client relations management (CRM) software
- Assist with billing and collection efforts
- New account set up and account maintenance duties to include but not limited to adding accounts, updating accounts, adding users or inactivating users, adding products/packages and inactivating products/packages. Ensuring changes are noted in the CRM
- Send communication, education and/or training materials to clients as needed
- Recognize, document and alert management of trends in customer inquiries
- Identify opportunities for system/process improvements to provider greater efficiencies and/or decreased client turnaround time
- Other duties as assigned

Qualifications/Requirements:

- Minimum of 1-year customer service experience
- Proficient in Microsoft Word, Excel, Outlook and PowerPoint
- Excellent verbal and written communications
- Analytical thinker and data analysis skills
- Ability to multi-task and manage a variety of deadlines
- Excellent attention to detail
- Positive, cooperative work attitude and team player