

JOB POSTING TEMPLATE

Date: June 2023

Department: Client Services

Job title: Supervisor, Client Services

Manager title Manager, Client Services

Job purpose

Responsible for look after a team of CS staff location, ensuring they give professional client service and generally doing their job accuracy and efficiency.

Objective of this job: helping to implement a client service standard and daily works at frontline for a team via training, coaching, mentoring employees, handling face-to-face complicated enquiries from clients; providing support the Office Manager in implementation/ supervision of OM functions including office service and operations.

In overall, Supervisor, Client Services is expected to maintain a team member and ensure daily works of that team run smoothly. This role will also provide support in office projects, maintenance, office operations. Supervisor will be the first level escalation for non-routine and complex issue within area.

Major accountabilities

Supervise all outputs from CS location which he/she be assigned to supervise including daily activities, perform standard service, communication style. And assisting the team by performing the tasks with them	50%
Support the Office Manager in supervision/ implementation of OM functions, including office services and maintenance. This role will be the first level escalation together with OM's PIC for non-routine and complex issue happened within area.	20%
Complete all daily necessary reports for quality control and give feedback in time	5%
Update and transparent special knowledge to team members by learning, training, coaching	15%
Evaluate and manage staff's performance. Identify and address staff training and coaching needs timely	10%

Specialized knowledge

- Service oriented mindset
- Attention to details and ability to follow guidelines and procedure
- Strong problem solving and complaint handling skill
- Multi-tasking. Strong communication and interpersonal skills, organizational skills
- Making decision skill
- English (speaking and writing) Proficiency in English is a plus
- Good command of PC skill (Excel, Word, Access)

Problem solving

- Proactive in resolving problem
- Able to understand or accomplish or deal with task/issue/situation/ person
- First level of escalation for non-routine and complex issue

Education and experience

- College/University graduated
- Female/Male
- At least 2 years of client service staff in financial services, life insurance experience is preferred.

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Communication scope

- Client
- Advisor
- Inter OP department for daily transaction
- AD force for support sale
- Office service for manage location office
- Marketing for company branding
- IT for all related to system

Management scope

Total number of staff managed (direct report): 6 - 10
Total number of location managed: 4 – 6