

SKILLS FRAMEWORK FOR FINANCIAL SERVICES SKILLS MAP - CLIENT SUPPORT MANAGER/ACCOUNT MANAGER			
Sector	Financial Services		
Track	Sales, After Sales, Distribution and Relationship Management		
Occupation	Account Manager		
Job Role	Client Support Manager/Account Manager		
Job Role Description	<p>The Client Support Manager/Account Manager is responsible for ensuring regular engagement with customers to provide service support as well as initiating and facilitating the renewal process for customers to enable continued business. He/She further leads activities meant to grow the business and enable the maintenance and development of customer relationships. He is involved in ensuring operational tasks are delivered to high standards and in accordance with the organisation's procedures.</p> <p>The Client Support Manager/Account Manager may be required to be contactable after office hours. He possesses business acumen, customer orientation and stakeholder management skills. He is confident and comfortable with building relationships, communicating and attending to customers' needs. He can prioritise and deliver towards multiple goals and quality standards.</p>		
Critical Work Functions and Key Tasks / Performance Expectations	Critical Work Functions	Key Tasks	
	Manage customer renewal process	Provide guidance on possible renewal solutions suited to customer needs	
		Collaborate with insurers and placement staff to customise solutions for customers based on their changing needs	
		Lead the development and presentation of customised solutions for large accounts	
		Offer technical advice and training to account-facing staff based on product and sector expertise	
		Conduct periodic reviews on the suitability of policies proposed for customers' needs for quality assurance management	
	Provide service support and relationship maintenance	Engage with customers with complex accounts and/or high net worth customers on a regular basis to maintain relationships	
		Ensure service support processes and procedures are accurately implemented by all account servicing staff	
		Resolve technical accounting and claims issues	
		Coordinate interactions between administration support, claims and placement teams to enable enhanced customer service	
		Understand changes in customer circumstances to ensure that the cover provided continues to match their needs	
	Support operational process excellence	Oversee the preparation and implementation of all transactions, paperwork, and internal processing for assigned accounts	
		Maintain entries of policy information in systems for invoicing	
		Lead the conduct of financial analyses and performance reporting for customers within portfolios as part of monitoring activities	
		Ensure full scopes of services are priced appropriately	
		Review and ensure the completeness of administrative documentation and that reporting activities are in accordance with the organisation's procedures	
	Source for business opportunities	Grow existing book of business and accounts by identifying new and/or existing opportunities	
		Identify sales and marketing strategies for managed accounts and customer portfolio	
Obtain market information to guide the development of proposals for new and/or existing customers			
Develop proposals to target new customers and/or current customers			
Review project plans for new sales initiatives			
Technical Skills and Competencies		Generic Skills and Competencies (Top 5)	
Account Management	Level 4	Service Orientation	Intermediate
Business Needs Analysis	Level 4	Interpersonal Skills	Intermediate
Business Opportunities Development	Level 4	Communication	Intermediate
Business Performance Management	Level 4	Problem Solving	Intermediate
Continuous Improvement Management	Level 4	Creative Thinking	Intermediate

Skills and Competencies	Customer Experience Management	Level 4		
	Customer Relationship management	Level 4		
	Ethical Culture	Level 4		
	Market Profiling	Level 4		
	People Performance Management	Level 4		
	Product Advisory	Level 4		
	Quality Assurance	Level 4		
	Sales Strategy	Level 4		
	Service Challenges	Level 4		
	Standard Operating Procedures Development	Level 4		
	Stakeholder Management	Level 4		
Programme Listing	For a list of Training Programmes available for the Financial Services sector, please visit: www.skillsfuture.sg/skills-framework/financial-services			

The information contained in this document serves as a guide.