

SKILLS FRAMEWORK FOR FINANCIAL SERVICES SKILLS MAP - CLIENT EXECUTIVE/ACCOUNT MANAGEMENT EXECUTIVE					
Sector	Financial Services				
Track	Sales, After Sales, Distribution and Relationship Management				
Occupation	Account Manager				
Job Role	Client Executive/Account Management Executive				
Job Role Description	<p>The Client Executive/Account Management Executive is responsible for establishing and maintaining accounts with customers through customer relationship management and account maintenance support. He/She provides ongoing service support and maintains a continued business relationship with customers. He delivers customer satisfaction by addressing customers' needs through transaction processing, facilitating customer renewals and supporting customers with day-to-day services. He is also tasked with maintaining and expanding customer portfolios for business growth.</p> <p>The Client Executive/Account Management Executive may be required to be contactable after office hours. He has strong stakeholder and customer management skills and is comfortable managing diversity. He is service oriented while being task-focused, detailed and able to deliver to high standards. He is proactive and a keen problem solver.</p>				
Critical Work Functions and Key Tasks / Performance Expectations	Critical Work Functions	Manage customer renewal process	Key Tasks		
			Initiate client contact with existing customers for the renewal process		
			Facilitate the identification and assessment of customer needs to round out accounts and drive renewal opportunities		
			Source and identify possible new renewal solutions or adapt existing solutions to suit customer needs		
			Advise customers on possible options based on their needs		
	Provide service support and relationship maintenance	Conduct periodic reviews on customer accounts and risk profiles to ensure adequacy of coverage		Provide ongoing day-to-day service support to customers	
		Engage customers on a regular basis to maintain relationships		Address and/or escalate issues relating to customer accounts to ensure resolution	
		Facilitate policy adjustments and changes required by customers by directing tasks to the relevant parties for execution		Collate and process documentation for changes to applications for policies	
		Collate and process documentation for changes to applications for policies		Conduct quoting, binding and issuing of policies	
	Support operational process excellence	Generate and maintain detailed records of administrative paperwork for account maintenance		Document entries of contractual information into systems for invoicing	
		Document entries of contractual information into systems for invoicing		Gather data to conduct preliminary financial analyses and performance reporting	
		Gather data to conduct preliminary financial analyses and performance reporting		Prepare production and activity reports	
		Prepare production and activity reports		Maintain and expand book of business and accounts within portfolio	
		Maintain and expand book of business and accounts within portfolio		Implement sales and marketing strategies for managed accounts and customer portfolio	
		Implement sales and marketing strategies for managed accounts and customer portfolio		Identify revenue enhancement opportunities within current customer pool and/or managed accounts	
	Source for business opportunities	Identify revenue enhancement opportunities within current customer pool and/or managed accounts		Develop proposals to target new customers and/or pre-existing customers	
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	Skills and Competencies	Technical Skills and Competencies		Generic Skills and Competencies (Top 5)	
Account Management		Level 3	Service Orientation	Intermediate	
Business Needs Analysis		Level 3	Communication	Intermediate	
Business Opportunities Development		Level 3	Interpersonal Skills	Basic	
Continuous Improvement Management		Level 3	Problem Solving	Basic	
Customer Experience Management		Level 3	Creative Thinking	Basic	
Customer Relationship management		Level 3			

Competencies	Ethical Culture	Level 3		
	Market Profiling	Level 3		
	Product Advisory	Level 3		
	Quality Assurance	Level 3		
	Sales Strategy	Level 3		
	Service Challenges	Level 3		
	Stakeholder Management	Level 3		
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.