### Sector
Financial Services

### Track
Sales, After Sales, Distribution and Relationship Management

### Occupation
Account Manager

#### Critical Work Functions and Key Tasks / Performance Expectations

### Job Role Description
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.

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.

<table>
<thead>
<tr>
<th>Critical Work Functions</th>
<th>Key Tasks</th>
<th>Support operational process excellence</th>
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</thead>
<tbody>
<tr>
<td>Manage customer renewal process</td>
<td>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</td>
<td>Collate and process documentation for changes to applications for policies Conduct quoting, binding and issuing of policies Generate and maintain detailed records of administrative paperwork for account maintenance</td>
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<tr>
<td>Provide service support and relationship maintenance</td>
<td>Source and identify possible new renewal solutions or adapt existing solutions to suit customer needs Advising customers on possible options based on their needs</td>
<td>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</td>
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<td>Source for business opportunities</td>
<td></td>
<td>Maintain and expand book of business and accounts within portfolio Implement sales and marketing strategies for managed accounts and customer portfolio Identify revenue enhancement opportunities within current customer pool and/or managed accounts Develop proposals to target new customers and/or pre-existing customers</td>
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</tbody>
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### Skills and Competencies

#### Technical Skills and Competencies

- Account Management: Level 3
- Business Needs Analysis: Level 3
- Business Opportunities Development: Level 3
- Continuous Improvement Management: Level 3
- Customer Experience Management: Level 3
- Customer Relationship management: Level 3

#### Generic Skills and Competencies (Top 5)

- Service Orientation: Intermediate
- Communication: Intermediate
- Interpersonal Skills: Basic
- Problem Solving: Basic
- Creative Thinking: Basic
<table>
<thead>
<tr>
<th>Programme</th>
<th>Level</th>
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<tr>
<td>Ethical Culture</td>
<td>Level 3</td>
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<tr>
<td>Market Profiling</td>
<td>Level 3</td>
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<tr>
<td>Product Advisory</td>
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<td>Quality Assurance</td>
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<td>Sales Strategy</td>
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<td>Service Challenges</td>
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<td>Stakeholder Management</td>
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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.