



Client Service Analyst Role

February 2024





Job Description

You will be part of a small but busy Client Support team, who cover all aspects of customer support from client onboarding, liaising with sales and finance, product support, and technical support. The team are also the central hub for all internal support requests and have regular reporting and delivery responsibilities across some of our products.

This will be a varied role, where you will raise and manage tickets through our JIRA board and deal directly with our clients by phone or email. You will gain an understanding of our products and will be expected to replicate faults reported by our customers and be able to support product questions from clients and internal teams. Where you aren't able to resolve an issue yourself, you will allocate the ticket to second line support or one of the technical teams for investigation. You will be responsible for managing the progress and keeping the customer informed in line with contractual SLAs.

The client support team are a key resource to many internal processes and will often provide support to the sales and finance teams. You should be prepared to be flexible with tasks, manage your time well and have a good eye for detail.

You will also be involved with collating and distributing monthly/quarterly updates to some of our larger clients.

From time to time, we may ask you to complete other activities that are needed that are within your skill set.

Key Responsibilities

- Engaging with clients and providing high quality service via phone or email.
- Ensure SLA's and ticket processes are adhered to, with timely updates to customers.
- Accurately recording and updating systems in line with the customer issue/requirements.
- Onboarding clients in a timely manner and liaising with sales and finance teams.
- Producing monthly and quarterly reports.
- Other varied administrative tasks

Key Skills

- Keen attention to detail.
- Strong customer service and administrative skills, proficient in all Microsoft suite.
- Ability to work independently or part of a team, used to meeting deadlines.
- Clear and concise communication
- Problem solver with an interest in IT support

You should have:

- 3 A Levels or equivalent
- 5 GCSEs (or equivalent) to include Maths and English
- ITIL qualifications or demonstrated knowledge of the ITIL framework would be an advantage
- Minimum of 3 year in a Support environment
- Financial Services experience (not essential)

This is a hybrid role, with 2 days a week in the office (or more if you choose). During the first month, there may be up to 3 days a week in the office.

Reporting structure – you will report to Head of Client Services.