



Client Services Officer

As a Client Services Officer, you'll play a key role in ensuring every interaction with our clients, from onboarding to ongoing support, is seamless, professional and personal. Working as part of our dedicated Client Services team, you'll help build trusted relationships with clients, liaise with colleagues across the business and contribute to the efficient running of our Guernsey office.

The key requirement of all roles detailed below is to consider the client experience at all times, and to work closely with the team and wider group to ensure a smooth onboarding process and ongoing relationship for clients.

Client Services Officer

- Respond promptly and accurately to a wide range of client queries and requests, received by phone, email or in-person.
- Meet and greet clients and ensure they are connected with the right people .
- Support the onboarding of new clients, both individual and institutional, and monitor the account opening process to ensure a seamless first experience for clients.
- Assist clients with access to and navigation of their online portal.
- Liaise with Relationship Managers to ensure a smooth handover into the relevant service team.
- Prepare and deliver client reports.
- Maintain accurate and up-to-date client records and documentation.
- Develop long-term relationships with clients to ensure the highest level of service.
- Support with continuous improvement of client service processes to enhance business scalability and efficiency, including constant review of procedures in order to make recommendations or amendments to current process.
- Quality assurance of system data and upkeep of documentation records.
- Attend various client events, which may, at times, be out of office hours.
- Assist in covering reception duties such as greeting clients, as required.

Other Requirements

We are looking for someone who:

- Is diligent, friendly and hardworking.
- Is willing to learn and not afraid to ask questions when further direction or clarification is needed.
- Has a client-first mindset, can think on their feet, solve problems and take ownership of tasks.
- Is motivated by and committed to personal development and open to feedback.
- Is passionate about service delivery, curious and interested about our business, its people and what makes us 'tick'.

- Is able to look for fresh ways of doing things and willing to constructively challenge processes and procedures to help drive the business forward.
- Is IT literate, accurate, effective, efficient, productive and focused.