DO MORE AND DO NEW

Client service manager/Client support service manager

Proficiency level

- X New Gen AI skills
- X New skills
- X Transferrable skills at the same proficiency level
- X Transferrable skills at a higher proficiency level[1]

Skills Framework track	Sales, after sales, distribution and relationship management
Job function	Customer operations
Job family	Client service
Sub-sectors	Corporate banking, private banking and wealth management, asset management
Expected augmentation by Gen AI	**Do more and do new:** Gen AI can automate the identification of recurring client servicing issues, recommend solutions, and enhance the review and analysis of SLA lapses. Gen AI tools can also support the creation of targeted client outreach plans; output from Gen AI tools can directly be used by the Head of Client Service to enable more strategic and well-informed decision-making

Key tasks that can benefit from Gen AI

Critical work functions	Key tasks
Maintain service delivery standards	Provide solutions for identified recurring client servicing issues and test contingencies to ensure service expectations are always maintained during service disruptions
	Review lapses in meeting SLAs and develop solutions according to client requirements and organizational capabilities
	Identify areas of improvement and recommend remedial actions based on analyses of client inquiries
	Conduct service reviews and check-ins with clients to obtain feedback and client satisfaction
	Review KPI reports to analyze performance against delivery standards
Coordinate collaborative efforts to provide solutions to clients	Develop insights on clients' needs based on analyses of client information and engagements
Manage client interactions	Attend to further inquiries from clients to ensure ongoing client satisfaction
	Review documents on client interactions to ensure they are documented according to organizational procedures
	Develop client outreach plans

New Gen AI skills

Skill	Proficiency level
Prompt design	3
Gen AI principles and applications	3
Ethical and responsible Gen AI adoption	3

Additional skills required for potential redesigned role

Role 1: Client implementation manager (adj.[2] Score: 0.58)

Continuous improvement management	4	Business performance management	3	Customer experience management	3
Ethical culture	4	People performance management	4	Business requirements mapping	4
Stakeholder management	4	Service challenges	4	Business planning	4
Account management	4	Business needs analysis	3	Change management	4

Role 2: KYC/Customer due diligence manager (adj. Score: 0.40)

Continuous improvement management	4	Service challenges	4	Regulatory risk assessment	4
Ethical culture	4	Customer acceptance checking and onboarding	3	Regulatory compliance	4
Stakeholder management	4	Sustainability risk management	3	Data governance	4
Account management	4	Regulatory and legal advisory	4	Corporate and business law application	4
People performance management	4	Taxonomy application	4	Customer relationship management	4

1. Transferrable skills with an increase in one level of proficiency is considered easier to acquire than transferable skills with multiple levels of increase in proficiency, followed by net new additional skills. Depending on job redesign for the financial institution, the financial institution will have to pick select skills to reskill employees on, via a combination of on-the-job training and existing courses.
2. Skills adjacency score.

Source: SkillsFuture Skills Framework

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