Customer service manager

| **Skills Framework track** | Sales, after sales, distribution and relationship management | | **Job function** | Customer operations | | **Job family** | Tellers / customer service |

| **Sub-sectors** | Retail banking, insurance | | **Expected augmentation by Gen AI** | **Do more:** Gen AI can automate the monitoring of customer satisfaction levels, streamline the validation and escalation of automated responses, and enhance the review of transaction records for adherence to guidelines. Gen AI tools can also optimize the tailoring of services based on customer segmentation and suggest solutions to recurring customer issues |

DO MORE

Key tasks that can benefit from Gen AI

Critical work functions	Key tasks
Specific to Retail Banking, Report issues and provide feedback	Provide sales and service support throughout the customer journey
Support customer requests and inquiries	Review records of transactions to ensure adherence to guidelines and completeness
	Stay up to date on product and service offerings as well as organization procedures
	Monitor customer satisfaction levels
Specific to Retail Banking, Support customer requests and inquiries	Promote customer usage and access to self-service and automated channel services
Report on issues and provide feedback	Handle any escalated issues or complaints
	Suggest possible solutions to recurring customer issues
Support operational process excellence	Incorporate internal and external regulatory guidelines to maintain compliance
Specific to Insurance, Support operational process excellence	Validate responses provided by automated channels, and escalate responses if customer needs are not appropriately addressed
	Ensure timely processing of applications
Specific to Retail Banking, Support operational process excellence	Conduct routine risk assessments of customer requests to detect fraud and/or irregular activities
	Tailor service based on customer segmentation

New Gen AI skills

Prompt design	3
Gen AI principles and applications	3
Ethical and responsible Gen AI adoption	3

Potential next-seniority level (Head of customer service) skills to acquire

Regulatory compliance	4	Stakeholder management	5	People performance management	5
Business risk assessment	4	Account management	5	Quality assurance	5
Business requirements mapping	5	Business performance management	5	Service challenges	5
Continuous improvement management	5	Change management	5	Standard operating procedures development	5
Ethical culture	5	Customer experience management	5	User experience design	5
Market profiling	5	Information technology application support and monitoring	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.

Source: SkillsFuture Skills Framework