





## Head of customer service

Proficiency level		
 New Gen AI skills	 Transferrable skills at the same proficiency level	
 New skills	 Transferrable skills at a higher proficiency level <sup>1</sup>	
<b>Skills Framework track</b>	Sales, after sales, distribution and relationship management	
<b>Job function</b>	Customer operations	
<b>Job family</b>	Tellers / customer service	
<b>Sub-sectors</b>	Retail banking, insurance	
<b>Expected augmentation by Gen AI</b>	<b>Do more:</b> Gen AI can analyze customer trends, propose enhancements to issue resolution protocols, and adherence policies. It can also optimize mitigation strategies for escalated issues and pre-empt changes in servicing policies, based on market trends, while improving risk assessment frameworks and customer segmentation strategies	

### Key tasks that can benefit from Gen AI

Critical work functions	Key tasks
Specific to retail banking. Report on issues and provide feedback	Define sales and service priorities for the organization within the customer journey
Support customer requests and inquiries	Establish organizational protocols to resolve issues quickly without compromising quality Design policies for team members to follow for adherence to organizational guidelines
Report on issues and provide feedback	Analyze customer trends to propose enhancements to sales and service management processes Determine patterns in escalated issues or complaints to define mitigation strategies Establish a framework to address customer issue resolutions
Support operational process excellence	Drive collaboration between relevant departments for increased communication on product or service offerings based on customer trends Ensure team members are trained and comply with internal and external regulation
Specific to insurance support operational process excellence	Pre-empt changes in front-line servicing policies based on new and emerging market and industry trends
Specific to retail banking support operational process excellence	Outline routine risk assessment frameworks to detect fraud and/or irregular activities Prioritize customer segmentation strategies for the organization

### New Gen AI skills

Gen AI strategy	5	Gen AI innovation, R&D, and innovation management	5	Prompt design	3
Leading Gen AI-enabled transformations	5	Ethical frameworks for Gen AI	5	Gen AI principles and applications	3
Gen AI data governance	5	Regulatory, legal, and risk management compliance in AI and Gen AI	5		

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