

JOB TITLE: CLIENT ACCOUNT EXECUTIVE SPECIALIST

Location: Farmington, CT

Type: Non-Exempt/Non-Officer

Essential functions and responsibilities:

Position Summary:

The Client Service Account Executive role is responsible to manage a deposit portfolio for small and middle market businesses who primarily work in the insurance industry and are located throughout 50 states. Account Executives are responsible for strategically developing, qualifying, and closing opportunities with assigned accounts. This role also requires a wide range of support for deposit operations and is responsible for working with internal and external customers via phone and email.

The position requires attention to detail, high standard of excellence, solid communication and organizational skills with a strong ability to multi-task. The ability to work well independently and within a team environment is essential to this role.

Qualifications Required:

- High School Degree or equivalent
- Minimum four years banking experience
- Proficient in using Excel, Word, Outlook and other applicable software

Essential Functions & Responsibilities:

- Primary responsibilities: provide comprehensive cash management solutions, cross-sell bank products, onboard new clients
- Build strong customer relationships with clients and service needs
- Develop a solution to emerging customer problems and needs
- Partner with internal operations teams to create solutions based on customer needs, including appropriate pricing strategies, solution implementation and future customer growth potential
- Increase profitability and build customer loyalty by proactively identifying new opportunities and delivering innovative solutions that continue to add value within the assigned client portfolio
- Develop account relationships with contacts at multiple levels within customer organizations
- Achieve weekly, monthly and annual activity goals, while supporting bank-wide goals
- Follow through from call handle time to after call follow up
- Assist with customers' online banking\remote deposit inquiries and troubleshoot as needed
- Demonstrate good working knowledge of banking products and services
- Process wire transfers, ACH, foreign drafts, deposits/payments and overdrafts.
- Reactivation of dormant accounts, processing returned deposited items, maintenance verification, and inputting new customer and file maintenance information for deposit accounts on the bank systems.
- Account reconciliation for overnight sweep accounts, preparing necessary agreements and forms that adhere to compliance requirements related to depository accounts and services.