



CLIENT REPRESENTATIVE

DUTIES

■ He/she assumes overall responsibility for a client portfolio in close collaboration with the managers for a three-fold purpose: ensuring the quality of the services provided, managing the risks and optimizing the profitability of the contracts. The client representative must be attentive to the needs of clients in order to develop the services and volumes assigned to him/her and negotiate new contract terms.

■ **Main activities:**

Financial analysis and advisory

- Study client risk: conduct audits at the companies, obtain information from them, analyze the financial documents;
- Make any recommendations to the management teams aimed at mitigating client risk;
- Prepare and transmit files on companies in need of revised commitments.

Sales development

- Maintain ongoing relations with members for the purpose of developing contracts;
- Detect the needs of members in terms of contract management and proposals.

Relations /Communications

- Work with the managers who manage the contracts on a daily basis;
- Notify the regional banks of monitoring and changes in the contracts, in connection with the sales departments;
- Participate in management committee meetings and offer reports on developments involving clients and contracts;
- Approximately once a week, present files in need of revisions to the head of operations.