



**Job Title: CLIENT SERVICES ANALYST**  
**Reports to: Director of Client Services**

The Client Services Analyst will join the Client Services team in onboarding and supporting clients onto the DirectBooks platform. This role will provide primary support during European hours and will be critical to working with our technology partner in ensuring stability for the platform.

The Client Services Analyst will communicate well, simplify complexity, be organized, and multi-task under tight deadlines. We are looking for people who have a passion for our mission to optimize the global financing markets and a disciplined execution focus. We want people who are committed to doing their best work in a collaborative, team environment.

**RESPONSIBILITIES:**

- Maintain existing client relationships through the processing of client requests, resolving client inquiries, and making sure key client information and documentation is up to date.
- Onboard new client accounts by collaborating with various teams in the DirectBooks organization to track progress and follow through to completion.
- Organize client readiness campaigns to effectively confirm deliverables are met.
- Conduct platform demonstrations and user training sessions.
- Solicit user feedback to identify and help improve solutions, existing tools, processes, and product features, including working with Product Development.

**REQUIRED SKILLS:**

- Excellent interpersonal know-how and communication skills, oral and written, and attention to detail.
- University degree and a minimum of 2 years of professional experience.
- Ability to prioritize and manage multiple responsibilities.
- Demonstrated prior experience working with clients integrated with various execution environments.
- Strong analytical and problem-solving abilities.
- Proactive and self-motivated with strong organizational skills.
- Basic understanding of Salesforce, Confluence and/or JIRA is a plus.

*DirectBooks provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.*

*Any information provided to us will be processed by DirectBooks in compliance with applicable data privacy laws and regulations, including but not limited to the EU General Data Protection Regulation and the equivalent UK regulations (GDPR). For further information about how DirectBooks processes your personal data, DirectBooks' legal basis for such processing, and the rights that you have with respect to your personal data that DirectBooks processes, please contact [legal@directbooks.com](mailto:legal@directbooks.com) for a copy of our Candidate Portal Policy.*

For more information, contact: <mailto:talent@directbooks.com>