



# PEAK

*Your Employee Benefits Guide*

## JOB DESCRIPTION

**POSITION TITLE:** Client Experience Specialist  
**REPORTING TO:** Director, Client Experience  
**LOCATION:** Kingston, Ontario  
**SALARY RANGE:** \$41,000 - \$58,000 per year base salary, bonus, comprehensive group benefits, wellness and group RRSP matching program (commensurate with experience and designations)

For more information or to apply for the position, please forward your resume to [info@peakbenefitsolutions.com](mailto:info@peakbenefitsolutions.com)

**DATE LAST REVISED:** February 27, 2023

**Peak Benefits Solutions Inc.** has been growing steadily and is now seeking to expand the team. The shareholders are seeking a mission-focused, strategic, and results-oriented Client Experience Specialist with skills in developing strong, lasting relationships with new and existing clients.

### GENERAL ACCOUNTABILITY

Reporting to the Director of Client Experience of Peak Benefit Solutions Inc., the Client Experience Specialist demonstrates a “service first” attitude and is a self-motivated individual who provides quality client experience based upon their thorough knowledge and understanding of the employee benefits industry. Incumbents handle a wide range of administrative and sales related tasks and will be able to work confidently on their own. This person must be an effective communicator, with the ability to deliver presentations in a group setting. They will be responsible for training plan administrators and must keep up to date with industry trends as well as client experience standards in order to deliver results.

### MAIN RESPONSIBILITIES

- Build close relationships with clients to understand and address their benefit and organizational needs.
- Follow-up on new client inquiries generated via client referrals and inquiries.
- Responsible for maintaining excellent documentation with on-line systems.
- Prepare and deliver presentations and educational sessions.
- Work with clients to help them achieve their objectives.

- Work with the Peak team to make operational recommendations on how to improve our client experience, processes, and procedures.
- Successfully resolve routine problems.
- Build trust relationships with leaders, co-workers, and clients.
- Coordinate the office of the aligned Advisor(s) and ensure an organized and effective workflow on client files (renewals and new business) and office operations
- Assist in scheduling for the aligned Advisor(s)
- Coordinate client cases across our related companies to ensure a high-caliber client experience
- Data entry for our CRM and other reporting and tracking tools
- Ensure all transactions comply with privacy, corporate and compliance standards
- Provide backfill support at front reception to greet clients and triage client inquiries as requested
- Work in a dynamic and changing environment with multiple priorities.
- Maintain a positive outlook and attitude; ability to identify and prioritize tasks and issues.
- Other duties as required.

## **WORKING RELATIONSHIPS**

**Customers/Clients:** Continuous interaction to guide and resolve questions, concerns and complaints.

**Companies:** Ongoing interaction to resolve escalated issues related to customer policies and to maintain up-to-date knowledge of individual company policies.

**Customer Service Representatives:** Ongoing interaction to direct work, exchange information and provide guidance related to client files.

## **SKILLS AND COMPETENCIES:**

- Must be self-motivated and a self-starter who works well under pressure.
- Must be highly organized with demonstrated ability to multi-task and manage a high volume of requisitions and effectively prioritize requests.
- Must be able to work independently and is results oriented.
- Strong project management and decision-making skills.
- Strong communication skills, both verbal and written.
- Demonstrated ability to build and maintain relationships.
- Technologically savvy, including proficiency with MS Office suite (Outlook, Word, Excel, PowerPoint) and online / web-based information systems.

## **QUALIFICATIONS:**

- CEBS designation an asset
- Licensed to sell Employee Benefits, or must be willing to become licensed.
- College education in Business or Human Resources, or equivalent experience.
- Strong marketing and customer service focus and experience base.
- Valid Ontario driver's license to travel to client sites as needed

- Knowledge of industry, insurers, products, systems and procedures through ongoing education.
- Strong knowledge of MS Office, including Word, Excel, PowerPoint and Outlook.

#### **WORKING CONDITIONS:**

**Physical Effort:** Majority of time is spent in a comfortable position and most activities require a variety of easy muscle movements. Sustained keyboarding with a required ability to sit for extended periods of time

**Physical Environment:** Environment has only occasional exposure to mild unpleasant or disagreeable conditions with remote possibility of accident or health hazards. Regular travel for business and client meetings required.

**Sensory Attention:** Work activities involve need to concentrate for intermediate durations and close attention several times daily. Excellent reading comprehension of printed and electronic text required.

**Mental Stress:** Fast-paced work environment with occasional exposure to one or more mental pressures (e.g. deadlines, needs for accurate, potentially difficult clients or situations).

*Please note: The above statement reflects the general details considered necessary to describe the principal functions of the job identified and shall not be considered as a conclusive description of all work required in the position. This job description may be subject to change in order to meet organizational, client or operational requirements.*