

JOB PROFILE



Client Consulting and Development Coordinator

General Description

Working collaboratively in a team environment, this position supports both the Client Consulting and Client Development team. This is a dynamic role, nurturing both our current members and prospects. The BCCA EBT values all opportunities to connect with organizations of like-values. By building strong relationships from the beginning of the client life cycle, starting with the initial contact through to the end of the sale and then on-going, we strive to educate, as well as listen, in order to provide value to our members. Working independently, as part of a cohesive, high-functioning team, and as a highly self-motivated professional, your forté is building relationships and identifying areas of improvement to enhance the client experience.

Reports to: Vice President

Supervises: n/a

Core Competencies

Alignment with our Mission, Vision & Values

- **Our Mission** - To be an innovative provider of employee benefits to a growing and dynamic community of discernible members.
- **Our Vision** - The Employee Benefit Program is dedicated to providing consistent and exceptional customer service. Our business has a loyal following of long-standing members that have been with the Program for countless years. Its innovative, efficient and needs-focused approach to serving the members defines its unparalleled success in an industry that's ever growing, ever changing. We act always with our clients at the forefront and do what is honest, reasonable and trustworthy.
- **Our Values** - Consistency, Loyalty, Innovation, Efficiency, Needs-focused, Trust

Responsibilities and Expectations

Relationship Management

- Develop and build strong working relationships with prospective clients and current members
- Build relationships with other EBT teams

Client Consulting

- Support Consulting team with prospect/client-related communications, assembling data to provide quotes and clerical/administrative support as required.
- Perform needs and financial analysis in order to provide value-added service and the successful presentation of proposal benefit plans
- Coordinate collection of information for group implementation and work with other EBT teams to ensure the group set-up process is smooth and timely
- Assist in coordinating data to provide current member groups with plan alternatives and analytics
- Coordinate and articulate resources to provide solutions to employer initiatives
- Provide support to other teams to accomplish department and organizational objectives
- Continually seek to enhance the client experience through process improvement and communications
- Stay up to date on benefit related issues and industry trends by participating in educational opportunities
- Perform other duties as required



Required Skills & Competencies

- Solid knowledge of the benefits industry
- Customer focused with exceptional customer service skills
- Strong problem-solving skills
- Strongly team oriented with the willingness/ability to collaborate and participate in sharing ideas
- Strong organizational skills and attention to detail
- Strong written and verbal communication, and administrative writing skills
- Demonstrate professionalism in the workplace including being accountable, and acting with honesty and integrity
- Proven ability to maintain composure and professionalism in all business situations
- A positive, 'roll up your sleeves, think outside the box, no job is too big or too small attitude

Ideal Education & Experience

- Minimum 2 - 3 years of related industry experience, insurance industry experience would be an asset
- University degree or college diploma with sales and/or communications emphasis
- GBA or working towards GBA

Objectives & Success Indicators

- *Consistency*- strive for and maintain excellence in client relations through outstanding communication, organizational and problem-solving skills
- *Loyalty*- positively promote our organization through dedicated partnership with existing and prospective clients
- *Innovation*- be a champion of positive change and flexibility in the work that you do; continuously look for innovative ways to improve client relations
- *Efficiency* – apply the principles of personal responsibility and accountability to your work and set an example of excellence for colleagues and clients
- *Needs-focused*- communicate and collaborate with colleagues and clients; offer mentorship, assistance and support in any way you can to ensure the highest level of service, community spirit and wellness
- *Trust*- demonstrate confidence and integrity in your dedication/ability to be accountable for decisions that have organizational impact