

Position: Client Success Rep (Plan Pro)

You've been working from an early age, knocking on doors, working at the mall, waiting tables, cutting lawns... whatever it took to afford a reasonable lifestyle growing up. You've worked in sales for a year or so and loved it, or maybe you're still working retail. That's fine. You have immense grit, and endless curiosity. You're looking for your big break - for someone to take a chance on you - and are ready to change the world.

Dialing >100 times a day + CRMs + rapid rapport + smashing gongs = Your Dream

You are easy to talk to, know who and where to direct their communication, and love working in a team. While knowledge about different financial account types like RRSPs and TFSA's are helpful, we can always teach you. ;)

What You'll Do:

- Making calls to prospective and current clients to discuss their plans
- Collaborating with the team to develop and implement new client service strategies
- Doing whatever it takes to ensure all our clients are enthusiastically satisfied and successful in achieving their goals
- CRM Experience (not mandatory): Use a Customer Relationship Management system to keep track of workflow
- Potential for leadership role

Everything we do rests on our ability to deliver a functional, scalable and delightful application to clients across Canada and the world.

You Have:

- An amazing attention to the finer details of life
- Outstanding written and verbal communication skills
- An amiable and friendly disposition; people naturally trust you
- A great personality that works well with a team

You Might Also Have:

- Financial knowledge of account types (RRSP, RESP, TFSA, etc.)
- Customer Service experience
- Office Admin experience
- Customer Relationship Management (CRM) system experience

We Have:

- Competitive salary and compensation structure, including options
- Beautiful, open-concept working environment conveniently situated in downtown Toronto
- Generous group benefits package
- Company events
- Frequent office lunches
- A team of ballers to work with
- An open mind for new ideas

Please send a resumé to careers@planswell.com with subject line “Plan Pro - {YOUR NAME}”.