Client Relationship Specialist

About the role

Penad Pension Services Limited is seeking a Client Relationship Specialist to manage client relationships and oversee software projects for clients in the pension and life and health insurance industries.

You will serve as the liaison between clients and our internal teams, ensuring business needs are understood, expectations are clearly communicated, and projects are delivered successfully. This role combines client relationship management, project management, and knowledge of pension administration and life and health insurance operations.

This position is well suited to someone who enjoys working with people, managing competing priorities, and translating business needs into clear, actionable requirements.

Key responsibilities

- Build and maintain strong client relationships, serving as the primary contact for assigned accounts and projects and as the liaison between clients and internal teams.
- Work with clients to understand their business needs, clarify requirements, and establish project objectives. Ensure client priorities and concerns are communicated to internal teams and addressed.
- Manage software implementations, enhancements, and other client projects from planning through delivery, overseeing scope, timelines, deliverables, and risks.
- Develop statements of work (SOWs) that define project scope, deliverables, timelines, assumptions, and responsibilities, and manage the client review and approval process.
- Coordinate project priorities and deliverables with development, quality assurance, and support teams.
- Manage changes to project scope and communicate their impact on timelines, costs, and resources.
- Lead client meetings, provide project status updates, document decisions, and follow up on outstanding items.
- Identify project risks and issues, taking timely action to address risks and resolve or escalate issues.
- Coordinate client testing, confirm that deliverables meet agreed requirements, and obtain client sign-off.

- Plan and deliver client training on software functionality and business processes.
- Develop and maintain user guides, training materials, and client-facing documentation to support effective use of the software.
- Identify opportunities to improve the client experience and strengthen long-term relationships.

Qualifications and experience

- Experience in client relationship management, project management, software implementation, or a similar role.
- Experience in pension administration and life and health insurance, with an understanding of relevant terminology, business processes, and administrative requirements.
- Experience with defined benefit pension plans is an asset.
- Ability to translate industry-specific business needs into clear requirements for software teams.
- Strong communication skills, including the ability to explain software concepts clearly to business users.
- Excellent organizational skills and the ability to manage multiple clients, projects, and competing priorities.
- Experience gathering business requirements and preparing project documentation.
- A practical, collaborative approach to solving problems and managing expectations.
- Familiarity with software development and testing processes.
- Relevant post-secondary education or an equivalent combination of education and experience.
- Project management certification is an asset.

Salary : $65,000 to $85,000

To apply for this position, email your resume and cover letter to careers@penad.ca . Only those candidates invited for an interview will be contacted.