

Client Service Associate (2)
Client Services – Client Care Centre
(1) Permanent opportunity & (1) 12 month-contract*

We have an excellent opportunity for two Client Service Associates. Our ideal candidate has broad knowledge of all pension life cycle events and is passionate about delivering exceptional multi-channel client centric service.

The Client Service Associate acts as the first point of contact and resolution for all telephone inquiries, walk-in clients, and emails by providing generalist expertise on all pension life cycle events and e-services.

Key Responsibilities:

- You have excellent client relationship management skills and fully engage with clients by adopting a holistic view of client service, asking probing questions, performing analysis of their circumstances to gain a thorough and accurate understanding of their needs, proactively diagnosing client issues and opportunities, providing recommendations in order to determine best options, customized solutions or direction to the appropriate area/position to obtain assistance in resolution.
- Completing client requests in real time where appropriate, you will also identify when to refer the client for Advisory services or to another area or position for additional support or processing; escalating sensitive matters/issues as required and ensuring service levels are maintained.
- You will proactively contact members to introduce them to Ontario Pension Board and our services, educate clients on the value of the Public Service Pension Plan (PSPP), collect their information to explain options (e.g. buybacks and transfers in), complete an assessment and analysis of their needs and direct them to the appropriate area/position for additional follow up and support where appropriate.
- You will actively participate in call reviews and other applicable measurement tools on an ongoing basis to evaluate performance metrics against client service standards and protocols to ensure targets are met.
- You will monitor client inquiries to proactively identify emerging issues and trends, make recommendations to minimize re-occurring inquiries, and continuously identify and recommend changes to enhance client experience, as well as operational efficiencies and effectiveness. You will work with internal partners to recommend and implement changes to service delivery opportunities, bridge knowledge across the team by sharing information and product knowledge content for service delivery excellence.
- You will act as a trusted advisor and demonstrate engagement, collaboration and relationship building within the organization.

Key Qualifications:

- Candidates who have or are working towards one of the following certifications will be considered for a permanent role: RRA, CEBS, PPAC, GBA or RPA. The Registered Retirement Analyst (RRA) designation is required; OPB will support the successful candidate in working on the RRA during their employment. Candidates who do not have or are not working towards one of the following designations would be considered for a contract role for up to 1 year. OPB will support the successful candidate in working on the RRA during their contract. *
- You have broad knowledge of PSPP provisions, pension standards legislation (e.g. Pension Benefit Act, Income Tax Act), as well as comprehensive knowledge of at least one pension life cycle event and a working understanding of related financial and retirement planning concepts and products.
- Your extensive experience in providing client service is complemented by your desire to build superior client relationships and enthusiasm and enjoyment for client contact.

- You enjoy a fast-paced client centric environment and thrive in real time service delivery. You have excellent communication skills, both written and oral, with the ability to explain technical information to a wide variety of clients and to adjust your communication style as required.
- You are able to effectively identify and address difficult situations with tact, diplomacy and demonstrated empathy and resiliency.
- You have effective analytical and problem-solving skills to understand and navigate complex client matters/issues and take appropriate action. You have well developed and proven organizational and time management skills which allow you to manage multiple tasks and priorities successfully. With a strong desire for continuous learning, you embrace a culture of teamwork, collaboration and service excellence. You are adaptable and able to respond to changing call demands by demonstrating flexibility throughout the day.

Please submit your resume if you are interested in this exciting opportunity, visit our careers page to apply: [OPB Careers Page](#)

The competition will remain open until a successful candidate is selected or until the competition is closed.

This competition is open to all employees of OPB and has been posted on LinkedIn. OPB is committed to providing accommodation for people with disabilities in its recruitment process. Please advise OPB if you require an accommodation and we will work with you to meet your needs.

OPB is committed to fostering a culture of diversity, equity and inclusiveness that reflects the diverse communities we serve. We welcome and encourage applications from those who may contribute to the further diversification of ideas.

Candidates being considered for this position will be required to submit to a background screening. We thank all applicants, however, only those selected for an interview will be contacted.