

**JOB TITLE:** Customer Relationship Manager  
**DEPARTMENT:** IDC Worldsource Insurance Network Inc. (“IDC WIN”)  
**REPORTS TO:** Vice President, Atlantic Canada  
**LOCATION:** Halifax, NS

**JOB STATEMENT:**

The role of the Customer Relationship Manager at IDC WIN is to serve as a liaison between IDC WIN and its advisors on various areas where assistance may be required from the time they sign up with IDC WIN, including training on systems and processes, resolution of complaints and other challenges with day-to-day business.

**ESSENTIAL FUNCTIONS:**

- Acting as a liaison between new advisors and the IDC WIN operation team in the first three months after the advisor contract is signed;
- Connecting new recruits with Carrier wholesalers/staff specifically assigned to service IDC WIN;
- Quarterbacking Fast Start Orientation training for new advisors and/or their assistants;
- Conducting orientation training for administrators and new advisors at their offices, upon request;
- Taking new advisors through a comprehensive demonstration of the IDC WIN website, Bluesun Advisor and RepVision with a focus on web tools such as forms and compliance information and IDC WIN contract review;
- Working with new recruits and AGA principals on compliance requirements such as collection of Sample Disclosure forms, Producer Compliance Manual and AGA Responsibilities;
- Assisting new recruits with carrier website questions such as login problems, retrieving commission statements, pulling client information, etc.;
- Following up with advisors periodically during the initial three months to make sure things are running smoothly and providing feedback to various teams if there are any gaps;
- Taking responsibility for the initial contracting of the advisor and for transferring the existing blocks of business from their current MGA;
- Assisting advisors with complex quotes and presentations offered by IDC WIN;
- Leading the event planning team for the various events across Atlantic Canada;
- Handling client complaints regarding IDC WIN advisors;
- Discussing advisor debt with IDC WIN advisors;
- Working with the Atlantic Canada staff to standardize and maintain processing standards;
- Being the lead contact for commission inquiries;
- Providing ongoing training of IDC WIN advisors on current and future systems
- Acting as the backup on life application processing when needed; and
- Assisting IDC WIN executives with tasks as may be assigned from time to time.

**QUALIFICATIONS:**

- Post-secondary education
- 5+ years of experience working in a customer service environment
- Completion of LOMA courses (i.e. FLMI, ACS) considered an asset
- Strong knowledge of MS Word, Excel, Outlook, PowerPoint
- Experience with VirtGate and asset

- Ability to work effectively and efficiently in a team environment
- Ability to exercise flexibility, innovation and creativity to get tasks done in a timely and accurate manner
- Ability to multitask and process in a timely manner and meet deadlines
- Excellent oral and written communication skills and strong negotiation skills
- Detail-oriented with high degree of accuracy
- Organized with the ability to prioritize workload
- Strong problem solving abilities

**COMPENSATION:**

Commensurate with experience

*If you are interested in applying for this position, please forward a cover letter and resume in confidence to [hr@worldsourcewealth.com](mailto:hr@worldsourcewealth.com).*

*Worldsource is committed to accessibility in employment and to ensuring equal access to employment opportunities for candidates, including persons with disabilities. In compliance with AODA, Worldsource will endeavour to provide reasonable accommodation to persons with disabilities in the recruitment process upon request. If you are selected for an interview and you require accommodation due to disability during the recruitment process, please notify the hiring manager upon scheduling your interview.*

*We thank all applicants for their interest but only those selected for an interview will be contacted.*

