



Senior Consultant - Employee Strategies Position Description

Reports to: VP, Employee Strategies
Updated: May 2, 2017

Company Overview

ES3 Advisory is an insurance and benefits company that's different. We are different in terms of the relationships we have with our clients, with our stakeholders and with our own team. We are a group of people that genuinely care about our clients, our team, the environment and the stakeholders beyond our four walls. We are passionate about being an example, not just for our industry but for how we walk the walk as a business.

We love working with people who share our passions. That means people who are driven to make a positive difference, people that drive innovation, people who place a high value on forging strong, long-term relationships and people who want to contribute to each other's success.

We are going through changing times in our industry – while others view technology and disruption in a fearful manner, we embrace and drive that change with our own team. We have never had a more ambitious 5-year plan in the wake of it all and having the right people on our team has never been more important.

ES3's vision is to empower people to build stronger families, stronger businesses and stronger communities. This vision guides our company culture and core values: Caring, Respect, Advocacy and Peace of Mind. These are not just buzzwords to be put up on a website, but guiding principles that lead our team into the road ahead with day to day decisions.

The Opportunity

The Employee Strategies' Senior Consultant role involves working with a great internal team as well as a dynamic group of companies in your portfolio. You are responsible for establishing and maintaining long-term relationships with HR, Finance and Payroll personnel at our clients' organizations, and for providing best in class benefits consulting services for mid-market and larger clients. The Senior Consultant is client facing and works closely with the Client Service Managers. You will be mentored and fully supported in your quest to deliver world class service to our clients. This role is a fast-paced dynamic client facing field position that requires a valid driving license and the ability to travel throughout Vancouver, the lower mainland and occasionally throughout Canada.

Key Responsibilities

Client Responsibilities

- Understanding the culture and guiding principles of your client block with the support of the VP, Employee Strategies and Business Development Leads
- Identifying gaps and opportunities within your client's current structure based on their guiding principles
- Developing strategic relationships with key account contacts and introducing ES3 team members as appropriate
- Overseeing the complete employee benefits cycle: plan design review, provider search, implementation, reporting, renewal negotiations, employee communication



- Staying on top of and communicating relevant industry trends to your client block to prepare them for long term planning
- You will be a key front facing member of the ES3 team. This will involve designing and delivering presentations to clients, leading client meetings as well as key employee presentations
- Peer reviewing all client facing materials authored by the Client Service Manager and Analyst teams
- Working very closely with our insurance partnerships through problem solving, negotiations and maintaining positive relationships
- Collaborating with the business development team and leadership team on shared client knowledge and insights
- Understanding the client's perspective and priorities, and working with the client and the Client Service Manager to resolve escalated administrative, contractual and financial issues
- Commitment to continuous improvement through internal process improvement strategy suggestions and external client service deliverables
- Effectively tracking and communicating the progress of monthly/quarterly metrics and initiatives to internal stakeholders and the leadership team
- Work collaboratively with the internal ES3 team to complete follow-up items from in-person meetings while managing client timelines - communicating meeting activity and client account details to ES3 service team for file updates and account management
- Managing special projects/tasks as required

Honing Your Skills

- You have a relentless commitment to professional and personal development. This includes: participating in industry educational opportunities, being an avid reader of industry publications, and participating in professional and industry organizations

Internal ES3 Committees and Team Meetings

ES3's collaborative and inclusive nature empowers employees to contribute to the culture of the company. All team members are to participate in team and department meetings, corporate initiatives as well as participate in at least one cross-departmental committee (Wellness, Compliance, Social, Events, etc.).

Education and Experience

Education

- Post-secondary education required and completion of (or working towards) related courses in group benefits (CEBS, GBA designations preferred)
- You must have your Life License Qualification Program (LLQP) or commit to completing it within the first three months of employment

Experience

- Minimum five years in the group benefits industry; experience in the group retirement industry is an asset
- Expertise in any of the following disciplines is considered an asset: underwriting, drug plan management, compensation, human resources, rate union negotiation, disability management, funding arrangements, and provincial health care plans



- Experience building internal and external relationships, handling difficult personalities or situations without conflict while demonstrating an ability to work collaboratively in a team environment. We are a team dedicated to self-awareness so you will be supported in this regard
- Experience in, and passionate about, delivering client-focused solutions based on customer needs, and an ability to assist with high severity requests or issue escalations with a fair and tactful approach
- Demonstrated success in delivering results while under pressure, performing multiple tasks without compromising accuracy, and maintaining professionalism evident through self-confidence and a positive, self-motivated attitude
- Excellent project management skills. We are an exciting, fast growing entrepreneurial company so you will be involved in multiple projects in order for the team to collectively hit our mandates
- Excellent mathematical and analytical skills. You are a quick learner and not intimidated by numbers!

Knowledge and Skills

- Strong proficiency in Microsoft Office, Internet and Outlook, with the ability to prepare PowerPoint presentations and Excel spreadsheets at an advanced level.
- Comfortable using technology solutions and software to enhance client deliverables as well as improve internal efficiency. We will continue to push the boundaries of our industry in this regard and your role will be a key one in identifying and adopting these systems.
- If you're not familiar with author Daniel Goleman's work, we highly encourage looking into it! The ideal fit is someone with an optimal balance of IQ, Emotional Intelligence and Social Intelligence. We will provide a high degree of support for developing in these areas but success involves coming in with an open mind and a willingness to grow, adapt and thrive.
- Strong Communication – both written and verbal. You have a number of stakeholders, sometimes with competing interests, and your role will be to understand those interests and clearly communicate your path to all parties. A key part of strong communication is active listening which is a skill you will have honed and developed to date.
- Problem solving skills are a key element of this role. We push the boundaries of service to our clients and that involves finding solutions to problems that suppliers may not have seen yet. We have numerous case studies of ES3 pioneers that were tasked with finding a solution for a client where the odds were against them, and yet they managed to carve a unique path.
- You have a desire to deliver excellence and as a result have a strong attention to detail with an innate ability to identify numerical and grammatical corrections within presentations and reports.
- We will leave this short and sweet: Your ability to build internal and external relationships will be the key element to your success.

Key success measures

1. Teaming up with our Client Service Managers, a key measure of your role's success will be to maintain or exceed ES3's industry leading client retention rate with your block of clients.
2. Return client calls and emails within ES3's industry leading service level agreement. All communication with clients must be professional and align with ES3's core values of care, respect, advocacy and peace of mind. Throughout all communication, the client must know ES3 cares, respects them and their needs, and advocates on their behalf.



3. Complete management of client relationship
 - a. Identify clients non-compliant with industry standard or legislative regulations.
 - b. Meet with clients as required and manage client's expectations of service – offering first-in-class service.
 - c. Document discussions in our proprietary client management platform and follow up on key items.
4. Work collaboratively with our Marketing Department and the Employee Strategies team to prepare and finalize all employee and employer communication material to ensure all content is relevant, accurate, ES3 branded and adheres to the needs of the client. All outgoing client material must be peer reviewed 24 hours prior to being presented to the client.
5. Actively manage WIP (Work-In-Progress) list and present to VP, Employee Strategies during weekly meetings for support, resources and advice as needed. Present priorities, status of projects as well as expected completion dates. This weekly check-in is an opportunity to show up fully present and have a collaborative discussion.

Interested candidates should forward their cover letter and resume to
accountservices@es3advisory.ca

Attention: VP, Employee Strategies