

## Client Service Associate

### Client Care Centre – Client Services

The Ontario Pension Board (OPB) administers the Public Service Pension Plan (the PSPP), a major defined benefit pension plan sponsored by the Government of Ontario. With 100,000 members and \$31 billion in assets, the PSPP is one of Canada's largest pension plans. It is also one of the country's oldest, successfully delivering the pension promise since the early 1920s. [Learn more about OPB.](#)

OPB's Client Care Centre is a team of dedicated pension experts and client service professionals that deliver trusted and caring service to our members. As the first point of contact for in-person, telephone and email inquiries, the Client Service Associate has extensive knowledge of all pension lifecycles and is responsible for guiding our members through OPB's suite of resources to support them in navigating their journey from plan enrolment to retirement with confidence.

This is an excellent opportunity to demonstrate superior customer service skills and technical expertise in translating complex pension and financial concepts into easily understandable information, playing a key role in delivering the pension promise.

#### Key Responsibilities:

With your excellent client relationship management skills, you will fully engage with clients by adopting a holistic view of client service and demonstrate commitment to the client experience by:

- 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 information to support decision-making; and
  - working collaboratively with trusted colleagues to facilitate resolution of complex/escalated cases.
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- Completing client requests in real time where appropriate, you will also identify when to refer the client to Advisory Services for decision making support, or other internal partners for additional support or processing, escalating sensitive matters/issues as required.
  - You will actively support management of telephony queues to ensure team service levels are maintained.
  - You will proactively contact members to introduce them to OPB and our services, educate clients on the value of the Public Service Pension Plan (PSPP) and explain options (e.g. buybacks and transfers in).
  - 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, 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 and content for service delivery excellence.

#### Key Qualifications:

- The Registered Retirement Associate (RRA) designation is required. OPB will support the successful candidate in working towards the RRA, which is a requirement for permanent employment. The following certifications would also be considered an asset: CEBS (GBA or RPA) or PPAC.

- 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 complex subject matter 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.
- You have a strong desire for continuous learning, embrace a culture of teamwork, collaboration, and service excellence.
- You are adaptable and able to respond to changing call demands by demonstrating flexibility and resiliency.
- Bilingualism (English/French) considered an asset.

**Please submit your resume if you are interested in this exciting opportunity.**

**[Careers - Ontario Pension Board \(opb.ca\)](https://www.opb.ca)**

**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.