

# Director of Sales and Customer Service

Full-time Permanent Position

## POSITION OVERVIEW

The Director of Sales and Customer Service will play a pivotal role in driving revenue, growth and service excellence for FP Canada primarily by providing leadership to the Certificant & Student Services team.

With a core focus of sales of certification programs (technical education and professional education programs), continuing education (CE), and sponsorships, as well other FP Canada events and programs, this role is responsible for leading and developing the customer service team members, ensuring they provide timely, accurate, and effective responses to customer inquiries, while identifying cross-selling opportunities.

As the Director of Sales and Customer Service, you will develop and execute a comprehensive sales strategy that aligns with FP Canada's strategic goals, collaborating closely with the VP, Business Development and Communications, and other key internal stakeholders.

## Key Responsibilities

In this role, you will:

### CUSTOMER SERVICE LEADERSHIP - 40%

- Oversee and develop the Certificant & Student Services (customer service) team, ensuring they consistently deliver exceptional service to FP Canada certificants, students, and other customers/stakeholders.
- Implement systems to track, monitor, and ensure timely and accurate responses to all customer inquiries, with a focus on improving customer satisfaction and response times.
- Identify and capitalize on **cross-selling opportunities** for additional FP Canada products and services.
- Develop and maintain highly efficient processes to manage customer service inquiries that span a wide range of FP Canada's products and services.
- Establish and monitor key performance indicators (KPIs) for the customer service team to ensure continuous improvement in service levels.
- Gather and analyze feedback from end users to continuously improve technology solutions and customer service processes.

## SALES STRATEGY AND EXECUTION – 30%

- Lead sales efforts for FP Canada’s **CFP®** and **QAFP™** certification programs and continuing education (CE) offerings.
- Develop and implement a new **sponsorship strategy** to engage partners and increase revenue opportunities for FP Canada.
- Manage and drive ticket sales for FP Canada conferences and events.
- Identify, target, and secure new business opportunities to achieve sales goals and increase market penetration.
- Monitor industry trends, customer needs, and competitive offerings to refine sales strategies and ensure FP Canada stays competitive and relevant.

## COLLABORATION AND RELATIONSHIP MANAGEMENT – 30%

- Collaborate closely with marketing and communications teams to align sales efforts with promotional campaigns.
- Build and maintain relationships with key industry partners, sponsors, and clients to enhance FP Canada’s brand and increase sales opportunities.
- Work with internal teams to develop promotional materials, sales presentations, and sponsorship proposals.
- Work closely with business units, IT, and project management teams to understand project requirements and deliver customer-centric solutions.
- Act as the go-to expert for new technology implementations, providing insights and guidance to ensure successful adoption and integration.

## Required Qualifications

The ideal candidate will have the following skills and experience:

- **Bachelor’s degree** in Business, Marketing, Sales, or a related field.
- Minimum **7-10 years of experience** in sales, business development, or customer service roles, with a demonstrated ability to meet or exceed sales targets. The ideal candidate will have past experience in both sales and customer service leadership.
- Strong leadership skills, with experience **managing and developing customer service teams**.
- Proven experience in **sales management**, ideally within the education, professional services, or financial services sectors.
- Exceptional **communication and presentation skills**, with the ability to build relationships and influence stakeholders at all levels.
- Experience in developing and executing successful **sponsorship strategies** is a strong asset.
- Experience with CRM systems and customer support software and knowledge of emerging technology trends and their application in customer service.
- Ability to analyze data, customer trends, and sales performance to optimize strategies and drive results.

## Competencies

The ideal candidate will have the following skills and experience:

- **Sales Leadership:** Demonstrated success in driving revenue growth through sales of courses, CE, and events.
- **Customer Focus:** A passion for delivering an exceptional customer experience with the ability to lead teams in providing service excellence.
- **Collaboration:** Ability to work cross-functionally and lead by influence, fostering strong working relationships internally and externally.
- **Strategic Thinking:** Ability to develop and execute sales and sponsorship strategies that align with FP Canada's broader goals and vision.
- **Results-Oriented:** A proven track record of meeting and exceeding sales and performance targets.

## ABOUT FP CANADA

Established in 1995, FP Canada is a national not-for-profit education, certification and professional oversight organization working in the public interest. FP Canada is dedicated to championing better financial wellness for all Canadians by leading the advancement of professional financial planning in Canada. Learn more at [FPCanada.ca](https://www.fpcanada.ca).

## WORKING WITH FP CANADA

We're [FP Canada](https://www.fpcanada.ca), a team of passionate and progressive professionals. FP Canada employs over 55 people, and our office is located in downtown Toronto. This is a full-time permanent position working 5 days per week, during core business hours, with some flexibility required. We offer a hybrid-work model, requiring at a minimum, two days a week (40%) on average, of employees' time be spent in the office.

We are committed to wellness and a healthy work environment for our employees. You will earn a highly competitive annual salary, generous paid vacation and personal time, and you will enjoy our comprehensive employee benefits, RRSP matching program, professional development opportunities, flexible work arrangements and regular social events.

We are service-oriented, principled, and driven to make a societal impact, and we strive for and demand excellence, integrity, and respect from each other as well as our external stakeholders. We value collaboration and flexibility, and together have created a collegial and positive work environment.

## Our Commitment to Inclusion and Diversity

FP Canada values inclusion and diversity, and different perspectives and experiences; and we are committed to working towards an inclusive and diverse organization, reflective of Canada's population. We encourage candidates who identify in traditionally underrepresented communities (women, racialized persons, indigenous persons, LGBTQ2S+ and persons with disabilities) to apply.

## Our Commitment to Accessibility

FP Canada is committed to ensuring equal access and participation for people with disabilities in accordance with the *Ontario Human Rights Code (OHRC)* and the *Accessibility for Ontarians with Disabilities Act (AODA)*. FP Canada will provide accommodation on request throughout the recruitment, selection and/or assessment process for applicants with disabilities. If you require accommodation, please inform our Human Resources Department at [careers@fpcanada.ca](mailto:careers@fpcanada.ca).

## **SALARY**

Salary based on experience, ranging from \$120,000 to \$159,000.

## **HOW TO APPLY**

To apply, please submit your application to [careers@fpcanada.ca](mailto:careers@fpcanada.ca) and note the position title in the subject line. Applications will be accepted until **Nov 20, 2024**.

We wish to thank all applicants for their interest and advise that only those selected for an interview will be contacted.