



POSITION: CLIENT SOLUTIONS EXECUTIVE – FLEX-TIME

[Silver Sherpa Inc.](#) is a professional services company delivering confidential planning and coordination services for [older people in transition](#). Services are focused in two key areas: Smart Ageing and Elder Management.

Our [Smart Ageing Program](#) includes auditing a client's current lifestyle and making recommendations to address needs or services that may be required now or in the future. Our passion is empowering people to plan their next chapter on their own terms.

Elder Management is a term we have coined that references an all-encompassing, proactive approach to life, health, and well-being. It includes [comprehensive planning and coordination services](#) across various sectors as well as [crisis management services](#) to assist older people and special needs families in making major transitions.

Many of our clients are in complex situations, requiring solutions that integrate thoughtful, customized health and personal care solutions as well as financial, and legal preparedness.

We are trusted advisors and co-pilots empowering people to create their own path and simplify important life decisions in three simple steps: PLAN, NAVIGATE and CONNECT. Our holistic and integrated approach to life planning is enhanced by the extent of expertise and value we offer our clients, and the ability to get things done. Client satisfaction is high with more than 50% of our clients renewing for services beyond their original contract.

Headquartered in Oakville, Ontario, we are growing across Canada. As a virtual company, we work remotely, the majority of the time, and maintain home offices.

This position is focused on the Toronto market. The successful candidate will have well-developed business and professional networks in Toronto.

POSITION OVERVIEW: CLIENT SOLUTIONS EXECUTIVE – FLEX-TIME

Are you a seasoned, passionate sales professional who presents with confidence and a desire to create impact and find solutions? Can you pivot from a meeting with senior partners in a boardroom to interfacing with a high-net worth family? Are you an inspired self-starter who wants to be part of a growing organization that makes a difference in the lives of older people? If so, join our dynamic team in the role of Client Solutions Executive (CSE).

Relationship building with Centre's of Influence (COIs) and business development strategies generate leads from our well-developed B2B, professional, and community networks. As a critical team member, you will be one of the faces of the organization and responsible for matching Silver Sherpa's services to prospective clients. You will drive sales growth while providing exceptional customer service.



As a CSE you will be supported by a diverse team with specialties and resources to assist you, so you become familiar with Silver Sherpa’s business model, policies and procedures, and revenue targets. A robust digital platform including newsletters, social media initiatives, website, and extensive networks support lead generation.

As a Silver Sherpa team member, you are an entrepreneurial thinker, self-starter, driven to meet and exceed monthly targets. You thrive in a fast-paced, professional work environment. You like the flexibility of working remotely, enjoy collaborating with team members, are client-focused, and detail oriented.

At Silver Sherpa, we are passionate about changing the way society thinks about ageing. As a Silver Sherpa team member, you must be caring and compassionate, with a keen desire to make a difference, helping people through stressful and confusing situations.

Please note: This is a flexible part-time position (about 30 hours/week) with the possibility of full time. Occasional evening or weekend work may be required to meet with a prospective client.

KEY ACCOUNTABILITIES

- Top line revenue goals.
- Manage entire sales cycle.
- Represent Silver Sherpa at seminars and key business events.
- Create and nurture relationships with referring COIs and aggregators.

ROLES AND RESPONSIBILITIES

Client Sales

- Identify prospects and successfully convert them into paying clients.
- Build relationships and educate families on the value of Silver Sherpa service offerings.
- Facilitate handoff to assigned Silver Sherpa Client Director and provide relationship management support as required throughout the client’s journey.
- Maintain relationships with clients by providing support, information, and guidance, leading to future referrals.
- Maintain and update lead management software on a daily basis. Accurately record and capture data from our CRM to maintain accurate sales forecasts.

Partner Relationship Management

- Manage assigned Silver Sherpa B2B and COI relationships.
- Identify, educate, and nurture new professional sources (e.g., wealth managers, lawyers, community leaders, etc.) to generate direct referrals to Silver Sherpa.
- Become a “go to” source for information and resources on elder management issues.
- Develop strategies for increasing opportunities with the professional groups that will drive Silver Sherpa business.

Other

- Contribute positively to the team through conference calls and in-person meetings.
- Become familiar with the broad range of services offered by our trusted network, such as residential communities, home care, legal, and wealth management companies.
- Other duties as assigned.



REQUIRED SKILLS AND COMPETENCIES

- A minimum of 15+ years of sales delivery: demonstrated history of success positioning and selling solutions to individuals in a quota or metrics driven environment.
- Strong customer focus, interpersonal, presentation, and communication skills.
- Demonstrated ability to assess dynamic family situations and quickly develop service options based upon client needs.
- Ability to develop and maintain good working relationships in a multi-stakeholder sale.
- Excellent written and verbal skills.
- Excellent computer literacy (WORD, Excel, PowerPoint, etc.) and experience with CRM systems.
- Past history of working with older demographic preferred. Lived experience also considered an asset.

EDUCATIONAL REQUIREMENTS

- Bachelor or master's degree with a concentration in business administration, marketing, or sales.
- Professional sales training is an asset.

HOME OFFICE AND OTHER REQUIREMENTS

- CSEs are required to have a designated home office space, allowing for privacy during working hours, as well as a high-speed Internet connection.
- CSEs must manage a daily schedule free from distractions and interruptions. For example, no audible distractions in the background.
- You will have a working laptop with capacity to fully load Microsoft Office, Outlook, and access to our CRM system and encrypted system.
- Must have reliable transportation to visit referral network and prospective clients.
- Must maintain a valid and current driver license with appropriate insurance.
- Must obtain an annual police record check including vulnerable sector screening.

CONTACT US

Please submit your resume and cover letter to: careers@silversherpa.net. Visit www.silversherpa.net for more information on the company.

We want to thank all applicants for their interest and effort in applying for this position. Only candidates selected for interviews will be contacted.