



ABOUT SILVER SHERPA

Silver Sherpa is a professional services company delivering confidential planning, coordination and project management services for older people and those with complex needs. Transitions often involve health care issues, financial and legal matters, personal care and day to day support. We are trusted advisors and co-pilots who help elders create their own path and simplify important life decisions in three easy steps: PLAN, NAVIGATE and CONNECT.

Headquartered in Oakville, Ontario, we are a virtual company, rapidly growing with clients across southern Ontario and the Greater Toronto Area as well as national and international clients and families.

POSITION OVERVIEW:

Client Solutions Executive - COIs – Part Time (Leading to Full Time)

Are you an energetic, professional and passionate individual comfortable in both a boardroom and a client's home? If so, join our dynamic team in the role of *Client Solutions Executive – Centres of Influence (CSE)*.

Through leads generated from Silver Sherpa Centres of Influence networks, and our innovative marketing, the CSE is responsible for matching Silver Sherpa's services to prospective clients and their families.

An important representative of the organization, you will also be responsible for identifying, building and nurturing professional services relationships and sources who refer clients to Silver Sherpa.

As a key Silver Sherpa team member, you are a self-starter and able to commit to an initial part-time position which would grow into a full-time position. You like the flexibility of working virtually. You enjoy working with limited supervision and are self-motivated, detail-oriented and entrepreneurial. An occasional evening or weekend may be required, whether to attend a networking event or to meet a prospect at their home.

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 transitions.

Senior care industry experience is preferred. Sales experience (or the ability to sell) is essential.

KEY ACCOUNTABILITIES

- Top line revenue goals based on fees from Silver Sherpa clients.
- Represent Silver Sherpa in public, such as at networking events, seminars, and group presentations.
- Create and nurture relationships with referring partners and associated players.



ROLES AND RESPONSIBILITIES

Client Sales

- Successfully convert prospects into paying customers.
- Build relationships and educate families on the value of the Silver Sherpa offering.
- Facilitate handoff to assigned Silver Sherpa Directors and provide relationship management support as required throughout the client's journey.
- Maintain relationships with customers by providing support, information and guidance leading to future referrals.
- Manage lead pipelines on a daily basis and accurately record in the CRM to maintain accurate sales forecasts.

Partner Relationship Management

- Mine assigned Silver Sherpa partner relationships.
- Identify, educate, and nurture new professional sources (e.g. financial advisors, etc.) to generate direct referrals to Silver Sherpa.
- Become a "go to" source for information and resources on elder management.
- Develop strategies for increasing opportunities with the professional groups that can drive Silver Sherpa business.

Other

- Contribute positively to the team through conference calls and in-person meetings.
- Become knowledgeable about the broad range of services offered by our partners, such as residential communities, home care, legal, and financial.
- Other duties, as assigned.

REQUIRED SKILLS AND COMPETENCIES

- 7+ years' experience: documented 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 family situations and quickly develop solutions based upon client needs.
- Ability to develop and maintain good working relationships in a multi-stakeholder sale.
- Excellent written and verbal skills, strong computer literacy.
- Past history of senior care industry preferred, or a strong desire to learn about senior care.

EDUCATIONAL REQUIREMENTS

- Bachelor's degree preferred.



HOME OFFICE AND OTHER REQUIREMENTS

- CSEs are required to provide their own tools and supplies required to provide the Services (subject to the Company's Expense Policy) including but not limited to a fully functioning and up-to-date cell phone and plan (across North America), a color printer complete with scanner, and a paper shredder. A company leased computer will be provided for the sole use of the Independent Contractor. The computer is fully loaded with Microsoft Office, Outlook, and access to the Silver Sherpa CRM system and supported by an IT managed group. Independent Contractor will sign and abide by the Use Policy.
- CSEs shall maintain a dedicated (home) office that affords the Independent Contractor an appropriate level of privacy and such office must include file storage with locked filing cabinet and password protected mobile/computing devices holding any Silver Sherpa materials or property.
- CSEs must manage a daily schedule free from distractions and interruptions. For example, no audible distractions in the background.
- CSEs are provided with a company laptop.
- Must have reliable transportation to visit partners and prospective clients.
- Must have and maintain a valid and current driver license.
- Must obtain an annual police record check including vulnerable sector screening.

CONTACT US

Please email applications to careers@silversherpa.net. Visit www.silversherpa.net for more information on the company.

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