



JOB DESCRIPTION

Position: Bilingual Member Experience Representative

Reports to: Director, Member Experience

Department: Sales, Marketing and Member Experience

Flexible Work Options Available: We are a hybrid workplace environment, granting team members the ability to work up to 3 days remotely per week.

| POSITION SUMMARY |
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| <p>The Bilingual Member Experience Representative is the first point of contact for our Members and will consistently deliver an exceptional service experience. In this multi-channel hands-on role, you will manage service, operations and administration for past, present, and prospective Life, Critical Illness, Disability, and other life and health insurance program Members.</p> |
| KEY RESPONSIBILITIES |
| <ul style="list-style-type: none"> • Be the first point of contact to service Member calls and digital channel inquiries; handle a variety of inquiries, which includes documenting and resolving any escalated issues • Develop a deep understanding of our products to provide accurate and timely support; provide sound judgement and ensure that information is relayed accurately and in a positive and courteous way • Process policy changes within the administration system including cancellations, maturities (i.e., plan closures), status changes (i.e., paid up policies), lapses, face amount changes, rider benefit cancellations, endowments, and provision of documents as required • Process Member Benefits including generating rebates, creating scholarship records and processing payments in the admin system • Generate Member letters (i.e., missed payment, lapse or termination, advance notices, maturity letters); beneficiary confirmations, and issue LTD policy coverage letters as required • Process revisions to LTD policies; liaise with the school board as appropriate • Calculate and submit Fraternal Benefits in the internal expense approval system monthly • Provide Member support/troubleshooting i.e., registration, login, self-service functions in online Portals such as TL, nowly, nowly Workspace or the Scholarship Awards Platform • Maintain productivity standards, service levels, and a high degree of Member satisfaction • Identify ways to streamline processes and work more effectively across our team to better serve our members • Work collaboratively with peers by sharing information and communicating in an open, honest, and professional manner • Other duties as assigned |
| QUALIFICATIONS & EXPERIENCE |
| <ul style="list-style-type: none"> • University or college degree/diploma in a relevant field of study • Bilingual in English and in French (verbal and written) |

- A minimum of 3 years of experience in a customer service role within financial services; life and disability insurance experience strongly preferred (Bonus: traditional Whole Life or Annuity experience)

SKILLS & CORE COMPETENCIES

- Strong customer focus and service orientation
- Excellent organizational skills, ability to work effectively in a high-volume environment and maintain all service standards
- Able to multi-task and coordinate own work to deliver on several items in parallel
- Tech savvy with the ability to learn new software
- Strong Excel and Word skills
- Able to complete work independently and collaborate within a team environment
- Willing to seek new knowledge and tasks, question current processes, and suggest improvements
- Sound problem solving and decision-making skills
- Strong written and verbal communication skills
- Strong alignment with our organizational mission, vision, and core values