



Insurance Consultant

About Valeyo

Valeyo is a leading Canadian-based solutions provider, partnering to deliver a full suite of business solutions, including lending technology, insurance products and services, to financial institutions nationwide. At Valeyo, we are focused on bringing together the right products, solutions, and services to help our partners thrive. And for more than 40 years, clients have trusted Valeyo to be their go-to provider based on the strength of our proprietary products, strategic partnerships, and people.

At Valeyo you will be part of an innovative, dynamic, and purpose-driven organization, and empowered to succeed through opportunities for professional growth and development. Our core values of accountability, partner-centricity, teamwork & collaboration, results-orientation, integrity, and passion are embedded across everything we do and guide our actions and decisions. Valeyo has head offices in Toronto, ON., and Burnaby, BC., with national presence through remote workforce and field offices.

The Role

The Insurance Consultant will report to the Vice President, Sales Operations and will work closely with the sales operations team to execute the organizations strategic sales and marketing initiatives. They will develop and implement appropriate action plans and initiatives to maximize Insurance growth within assigned accounts. The Insurance Consultant will be the key point of contact for Insurance sales and service requests for each assigned account and responsible for driving and achieving annual Insurance growth objectives. In addition, they will play a key role in client retention, revenue growth, training and ongoing service and sales support for partners Insurance programs.

What you'll be doing

- Drives strategic sales growth and account planning process; prospects and pursues new business opportunities, assesses and uncovers partner needs and develops effective partner review sessions supported by regularly updated action plans.
- Determines Insurance sales goals and opportunities for each partner to understand need for different products and services. Utilizes product training, sales coaching and recognition programs to motivate product sales and encourage overall revenue growth.
- Communicates and collaborates with internal team members to ensure Insurance products and services are being implemented and administered to partners expectations.
- Maintains an understanding of Credit Union regulations and market trends to ensure proactive results and adding value to our partners.
- Creates and builds relationships with new and existing accounts to support the execution of business plans.
- Coordinates activities with partners to ensure support for product engagement and account management functions.
- Regularly visit/meet with partners in assigned area.



- Prepare for client meetings and presentations with documentation, facts, figures and other support documents.
- Performs overall reviews of product quality and effectiveness along with presenting results and recommendations to client.
- Projects a professional company image and provides excellent quality of service to corporate clients' members and staff within the company guidelines. .
- Attends credit union annual general meetings and other relevant seminars and meetings, as assigned
- Performs other related duties, as assigned.

What you'll bring

- Five years lending, credit union or financial industry experience
- Post-secondary education will be an asset
- LLQP Life License required
- Exceptional sales and service skills; demonstrated ability to build relationships and maintain current business
- Strong presentation skills
- Strong interpersonal and communication skills
- Ability to work independently, with little supervision
- Must be proficient with common computer applications particularly MS Word, Excel, Outlook and PowerPoint
- Exhibits enthusiasm and promotes a team environment

What's in it for you?

- Competitive base salary with Valeyo Achievement Award
- Group Retirement Savings Plan (RRSP) with a company match for Deferred Profit Sharing Plan (DPSP)
- Comprehensive group benefits program which includes medical, dental, Employee Assistance Program, Health Spending Account, Personal Spending Account and much more
- Paid time-off includes paid vacation, personal/sick time, wellness day, Stat holidays
- Professional growth and development opportunities through training and educational assistance programs
- A culture that promotes a healthy, fulfilling work-life balance though flexible workplace policy
- Discounted Goodlife memberships, and additional work perks

Apply to communications@valeyo.com

What you need to know

Valeyo is committed to providing a barrier-free work environment in concert with the Accessibility for Ontarians with Disabilities Act and the Ontario Human Rights Code. As such, Valeyo will provide reasonable accommodations available to applicants with disabilities upon request during the recruitment process. Please contact hr@valeyo.com for accommodation requests.