



JOB TITLE: Manager, Training and Development
DEPARTMENT: Administration, Worldsource Wealth Management Inc. (“WWM”)
REPORTS TO: Director, Training and Development
LOCATION: Markham, Ontario or Vancouver, BC

JOB STATEMENT:

Reporting to the Director, Training and Development, the Manager of Training and Development will be responsible for designing, creating, and organizing scalable and impactful training modules from initial onboarding onwards using various mediums (i.e. print, live sessions, online learning). This highly-motivated and energetic candidate will be working in a fast-paced environment, building solid relationships and maximizing customer loyalty in a fast-paced MFDA/IRROC environment. Additionally, the candidate will take personal responsibility for identifying client needs and providing service excellence while continuously looking for ways to improve quality service delivery.

ESSENTIAL FUNCTIONS:

- Developing print and online training content (in consultation with all internal stakeholders), ensuring both technical and customer experience elements are integrated in all levels of training;
- Developing product and process webinars for both business lines, with key updates;
- Partnering with Advisor Relations in the development of the internal training program for onboarding of new Advisor Relations Representatives;
- Managing day-to-day operations of the Training department including: effective scheduling, communication, and delivery of training content and rolling out enhancements;
- Participating in management meetings, providing consultation on policy and process issues and developing training strategies to address;
- Ongoing review, investigation and maintenance of technical tools to enhance training experience;
- Effectively managing resources through projects and rollouts for superior service delivery;
- Monitoring and coaching staff on improvements to training delivery;
- Creating, adhering to, and reviewing departmental service standards;
- Analyzing, researching and responding to client inquiries in a proactive manner;
- Managing and maintaining updates and relevancy of all existing training materials;
- Reviewing of all items required for testing of releases and coordination of test cases among the Training team;
- Participating in daily huddles with Advisor Relations/Business Development and escalating issues as needed;
- Establishing cadence for regular team meetings and empowering the team to manage day-to-day tasks, while monitoring to ensure scheduled timelines are being met;
- Providing career, leadership development coaching and guidance through one-on-one check-ins;
- Managing, mentoring, motivating, leading and inspiring the team to constantly deliver excellence in performance and behaviours that are aligned with corporate culture; and
- Assisting in recruiting and retaining high performance talent.

QUALIFICATIONS:

- Supervisory or Management experience
- Post-secondary degree or equivalent experience
- IFIC or CSC an asset

- Minimum of 15 years of similar experience within the investment industry
- Effective written and verbal communication skills (French would be an asset)
- Willingness to work independently
- Ability to multitask with effective management of projects, timelines and priorities
- Strong customer focus and strong professional acumen
- Effective problem solving, analytical and conflict resolution skills
- Superior organizational and listening skills
- Familiarity with the Dataphile preferred
- Excellent PC skills including: Word, PowerPoint, Outlook, and Excel
- Ability to travel (within Canada), as required

COMPENSATION:

Commensurate with experience

If you are interested in applying for this position, please forward a cover letter and resume in confidence to hr@worldsourcewealth.com.

Worldsource is committed to accessibility in employment and to ensuring equal access to employment opportunities for candidates, including persons with disabilities. In compliance with AODA, Worldsource will endeavour to provide reasonable accommodation to persons with disabilities in the recruitment process upon request. If you are selected for an interview and you require accommodation due to disability during the recruitment process, please notify the hiring manager upon scheduling your interview.

We thank all applicants for their interest but only those selected for an interview will be contacted.

