



Canadian Centre for Occupational Health and Safety  Centre canadien d'hygiène et de sécurité au travail

## JOB DESCRIPTION

Position Title:	Manager, Client Services
Position #:	CM-013
Service Unit/Department:	Client Services
Reports to (Title):	Vice President, Operations
Revision #:	2
Revision Date:	October 6, 2023
Revised by (Name):	Janet Mannella
Revised by (Title):	Vice President, Operations
Classification Level:	CCOHS-13

## JOB SUMMARY

Through its services and products, CCOHS advances health and safety in Canadian workplaces, and the physical and mental well-being of Canadians.

The Client Services Service Unit provides a comprehensive information-based service on all aspects of client/customer service to fulfill the needs of Canadians. Services include specific applications/programs and database materials designed support a safe and healthy workplace. The unit's primary task is to be customer-oriented and collaborate closely with clients to determine the best course of action for resolving client issues, growing the client base by pursuing sales opportunities, identifying new clients, and examining client satisfaction. This position is also responsible for developing, implementing, and monitoring common performance standards and practices.

Reporting to the Vice President, Operations, the Manager is part of a team of operations service unit managers and is responsible for achieving the performance goals and revenue targets assigned to the service unit on a fiscal year-over-year basis in full support of the CCOHS Strategic Plan. The work of the service unit is aligned with the CCOHS Strategic Plan and accomplished through the staff within the unit, as well as cross functional project teams.

The Manager champions excellence of performance, ensures the success of the planning and plan implementation process, manages the staff of the service unit, and works to develop staff through one-on-one coaching and training opportunities as appropriate, provides leadership, sets an example to others and creates a healthy workplace for people to thrive in.

The Manager is responsible for ensuring that the service unit work and plans are consistent with strategic plans and partnership agreements and fulfilled according to the allocated resources and revenue targets, goals, key performance indicators and priorities. The Manager is responsible for human resource management of staff in the service unit including hiring, performance management, training and development, health and safety, and employee relations.

## DUTIES AND RESPONSIBILITIES

### 1. Staff Management

40%

- 1.1. Lead and manage a team of multi-disciplinary professional staff to achieve the performance goals and targets of the service unit.
- 1.2. Identify annual performance goals and objectives for each team member; evaluate and manage performance through informal and formal processes, including conducting annual Performance Appraisals.

- 1.3. Make recommendations on merit-based salary increases based on performance outcomes, when applicable.
- 1.4. Champion and model CCOHS' organizational values; instill and reinforce those values in team members.
- 1.5. Identify staffing needs for the service unit and collaborate with human resources in hiring team members with the knowledge, skills, and experience to perform the service unit's work.
- 1.6. Manage the training, education, and development of staff members equitably, and in line with the annual budget allocation.
- 1.7. Assign and review work, provide feedback, coaching, mentoring, problem solving and resources for staff members to support their productivity and success.
- 1.8. Manage employee health, safety, and wellness and accommodation plans to ensure a physically and psychologically safe workplace.
- 1.9. Ensure that adequate human resources are available to complete the work of the service unit, and that resource allocation commitments are maintained.
- 1.10. Monitor the partnership work of staff assigned from other service units.
- 1.11. Address employee issues including conflict resolution, performance improvement, discipline, termination, grievances and if needed, represent the employer in related formal processes.

## **2. Unit-Specific Functions**

**20%**

- 2.1. Oversee Account Managers and Client Service Representatives to deliver valuable outcomes with a customer-oriented mindset and collaboration with internal and external stakeholders.
- 2.2. Investigate and pursue all opportunities to expand the services and programs offered to the current client base by setting revenue targets and other sales and key performance indicator (KPI) metrics.
- 2.3. Identify potential new clients within existing markets, develop strategies to gain business.
- 2.4. Define a strategic roadmap for the department by collaborating with CCOHS internal stakeholders to address current gaps through client surveys and feedback.
- 2.5. Analyze existing processes/procedures to determine client solutions and client vision.
- 2.6. Collaborate with Operations to establish standard operating procedures for meeting customer expectations.
- 2.7. Develop tools and strategies for client service team members to develop client quotes, proposals, QA, and testing.
- 2.8. Work with departments to develop a detailed understanding of their business requirements, work processes, application and custom report requirement then lead initiatives to implement or enhance support processes and address needs.

## **3. Service Unit Operations**

**15%**

- 3.1. Develop a comprehensive plan to achieve the goals and targets assigned to the service unit and monitor the progress of the plan.
- 3.2. Report on plan progress and take the necessary steps to ensure successful completion of work by members of the service unit.
- 3.3. Develop and maintain effective communication among members of the service unit and with other Service Unit Managers and the Vice President, Operations.
- 3.4. Maintain quality service by setting quality standards and ensuring those standards are met, analyzing, and resolving related problems, and recommending improvements.

## **4. Financial Administration**

**15%**

- 4.1. Manage financial resources allocated to support the unit's strategy and plans in compliance with delegated financial authorities, policies, and procedures.
- 4.2. Oversee and make recommendations on financial resource allocation.
- 4.3. Provide input into the annual budget forecasting exercise by anticipating and proactively bringing forward business unit needs and expected budget impacts.
- 4.4. Monitor and manage assigned budgets in compliance with all financial process and reporting requirements.

- 4.5. Assess financial priorities on an ongoing basis and allocate expenditures as needs arise.
- 4.6. Monitor expenditures relative to forecasted amounts with signing authority to initiate.
- 4.7. Review and approve expenditures.
- 4.8. Following the procurement process, has the authority to bind the employer in contracts for services/products from third party service providers or vendors.
- 4.9. Liaise with jurisdictional partners to secure funding.

**5. CCOHS Representation 5%**

- 5.1. Represent CCOHS at a variety of external stakeholder events such as meetings and conferences to promote products and services and develop collaborative projects.
- 5.2. Liaising with external stakeholders, outreach, maintaining and relationship development.

**6. Other 5%**

- 6.1. Other related duties, as assigned.

**SUPERVISION**

Direct Reports (#)	Eight (8) Unionized Employees
Indirect Reports (#)	None

**EDUCATION**

University degree in business or a field related to Customer support and Client Services in health and safety, or an equivalent combination of education and experience.

**EXPERIENCE**

- At least five years of recent related experience in a senior level business, client/customer service position or a related field, inclusive of at least three (3) years of recent experience managing or supervising professional employees. Knowledge of the health and safety field is an asset.
- Five (5) years of experience in information and knowledge management and/or project management, or an equivalent combination of education and experience.

**SKILLS**

- Expert knowledge of business solutions, analyzing data, sales strategies, and client/customer service solutions.
- Experience in researching, synthesizing, and summarizing credible and current information, and responding to client inquiries.
- Strong leadership skills, including the ability to effectively coach, motivate and lead a team.
- Excellent written and verbal articulation of complex concepts, facilitation, and communication skills.
- Self-directed and self-motivated, demonstrating a high level of professionalism, ethics, and confidence.
- Ability to earn trust of others and develop positive working relationships across the organization.
- Experience using technology to support various functions (database management, operating systems, search/retrieval software and Microsoft suite).
- Expertise in understanding and developing business development solutions by analyzing facts and developing solutions.
- Ability to effectively influence stakeholders, solve problems and identify creative solutions.
- Ability to deal with sensitive, personal, and confidential information with tact, sensitivity, and diplomacy while maintaining appropriate confidentiality.
- Excellent project and time management skills
- Ability to communicate in both official languages is desirable.

## OTHER

Hours of Work: Monday to Friday; 37.5 weekly hours; schedule is determined with approval from Manager, within core hours.

Job-Specific Requirements: Pre-employment requirements including reliability status and security screening. Must possess valid driver's license.