

Conquest Planning delivers personalized prioritized financial planning strategies that will help financial advisors and their clients see what possibilities exist for their financial future. We believe a goals-based approach to financial literacy, delivered through a human centered digital experience, will increase the number of people who can benefit from financial advice. . We are based out of Winnipeg, Manitoba and have team members located across Canada, the United States, and United Kingdom.

We are seeking a **Senior Training Specialist – Bilingual**, to join our dynamic team!

As Senior Training Specialist, reporting to the Manager, Advisor Support & Product Adoption, you will be responsible to develop and deliver training (English or French) to end-user customers of Conquest Planning's software. A focus will be the creation and ongoing maintenance of an online-based curriculum designed to teach and train new users on the Conquest application. As the Senior Training Specialist, you will apply your financial planning expertise with a passion for supporting the learning needs of the end-user so they can best leverage our technology effectively in their daily activities. Interaction with the end-user community will be ongoing to determine appropriate training needs and priorities, and gauging satisfaction with training program delivery. Training will primarily be conducted virtually. In-person training may occasionally be required therefore travel within Canada will be a necessary requirement of this position.

Duties of the role include:

- Combine financial planning expertise with the Conquest Planning application to attain mastery level knowledge of Conquest software to develop and deliver training to users.
- Develop new and improves existing curriculum that will enhance the customers' learning experience and achieve strong independent users of the software.
- Deliver learning sessions at an exceptional level using established delivery standards, including but not limited to both webinar/remote and in-person settings.
- Demonstrate an understanding of adult learning/pedagogy principles and instructional design in developing appropriate training content with the objective of empowering customers to use the software correctly and independently.
- Establish a positive learning environment that stimulates interest and enhances learner understanding.
- Interact closely with end-client community to gauge interest in, and satisfaction with, current training programs. Coordinate user/pilot groups to solicit feedback from the end user community.
- Follow through to resolution, any customer feedback and questions received through training sessions, email, or other communication channels.

- Stay current on all product upgrades and incorporate into all future training.
- Maintain instruction manuals in accordance with the pre-established documentation standards.
- Keeps up to date with the overall economic and financial environment, current events, market conditions, trends, and changes to legislation.
- Provide support to other departments as required (i.e., Support, Sales, Customer Success).
- Ability to travel when required, in Canada; valid driver's license with acceptable driving record required.
- Act as an ambassador, representing the company and brand.

Qualifications required:

- Experience in the financial planning/fintech industry specifically related to training and coaching advisors on applications and concepts necessary to their practice and ensuring the best outcome for their clients
- Degree or diploma in curriculum development, instructional design, or experience in developing curriculum and training courses
- Experience with learning management system platforms and in developing training curriculum that presents the subject matter in an engaging manner that promotes learning and understanding of content
- Excellent verbal and written communication skills – English and French
- Outstanding customer service and organizational skills
- Positive, results oriented mindset
- Ability to multi-task effectively and to consistently meet assigned deadlines
- Ability to maintain composure and professionalism and adaptable to change
- Possess a high level of initiative, aptitude, and energy to succeed in a fast-paced environment

What to expect:

- An inclusive culture comprised of extremely talented individuals.
- A leadership team with a proven track record of success.
- The opportunity to join a company as it expands across the globe.
- Competitive compensation and generous benefits.

How to Apply:

We're excited to learn about you and want to give you the opportunity to set yourself apart from everyone else. Along with your Resume, send us a personalized Cover Letter, Email or Video with the following:

- Why you are interested in this job, the fintech industry, or any other reason you would love to work with us.

Next steps:

If this exciting opportunity is of interest to you, please forward your application as described above with Senior Training Specialist in the subject line to human.resources@conquestplanning.com by November 7, 2022

We thank all applicants for their interest. Only those invited for an interview will be contacted.

Conquest Planning Inc. is an equal opportunity employer. Our inclusive work environment welcomes diversity and supports accessibility. If you require accommodation at any time during the recruitment process, please contact Humanresources@conquestplanning.com.