

Job Title: Sales Coordinator

Location: Oakville

Position Type: Full-time On-site



About Us:

Harvest Portfolios Group Inc. is a leading provider of Exchange-Traded Funds (ETFs) in Canada. We are dedicated to helping investors achieve their financial goals through innovative investment solutions. As part of our continued growth, we are seeking a Sales Coordinator to support our sales team and ensure the efficient operation of sales processes.

Job Description:

Role Overview: As a Sales Coordinator at Harvest Portfolios Group Inc., you will play a crucial role in supporting our sales team, ensuring that sales activities run smoothly and efficiently. You will be responsible for updating Salesforce, managing client data, and processing expense accounts, contributing to the overall success of our sales department.

Key Responsibilities:

Sales Support:

- Collaborate with the sales team to provide administrative support, including scheduling meetings, managing calendars, and coordinating travel arrangements.
- Assist in the preparation of sales reports and presentations for clients.

Salesforce Management:

- Update and maintain Salesforce CRM with accurate and up-to-date client information.
- Monitor and report on data quality and consistency.
- Create and customize reports and dashboards for sales and management teams.
- Provide Salesforce training and support to sales team members.

Expense Account Processing:

- Manage and process expense accounts for the sales team in a timely and accurate manner.
- Maintain records of all expenses, receipts, and approvals.

Client Data Management:

- Maintain accurate and organized records of client interactions, including emails, calls, and meetings.
- Ensure client data is complete, up-to-date, and easily accessible for the sales team.
- Assist in preparing client presentations and proposals.

Cross-Functional Collaboration:

- Work closely with other departments, including marketing, compliance, and operations, to ensure seamless communication and information flow.
- Collaborate with team members to improve sales processes and maximize efficiency.

Qualifications:

- Diploma in Business Administration, Finance, or a related field preferred.
- Proven experience in Salesforce CRM administration and proficiency in Microsoft Office Suite (especially Excel).
- Strong attention to detail and organizational skills.
- Excellent communication, interpersonal, and teamwork skills.
- Ability to handle confidential information with discretion.
- Previous experience in financial services or the ETF industry is a plus.



Benefits:

- Competitive salary and performance-based bonuses.
- Comprehensive health, and dental benefits
- Professional development opportunities.
- Collaborative and dynamic work environment.

If you are a detail-oriented and organized individual with a passion for supporting sales teams and managing data effectively, we encourage you to apply for the Sales Coordinator position at Harvest Portfolios Group Inc. Join us in delivering innovative investment solutions to our clients while contributing to our growth and success in the financial industry.

Interested applicants please forward their resume with a cover letter to resumes@harvestetfs.com.

We thank all applicants in advance for their interest, but only those candidates shortlisted for interviews will be contacted.

Harvest Portfolios Group Inc. is committed to creating a diverse and inclusive environment and is proud to be an equal-opportunity employer. All qualified applicants will receive consideration for employment without regard to gender, ethnicity, religion, sexual orientation or expression, disability, or age.