

BE A PART OF OUR TEAM!

**WE ARE HIRING REGIONAL
SCHEDULERS. WHAT MAKES
AN AWESOME REGIONAL
SCHEDULER?
MAD PHONE SKILLS.**

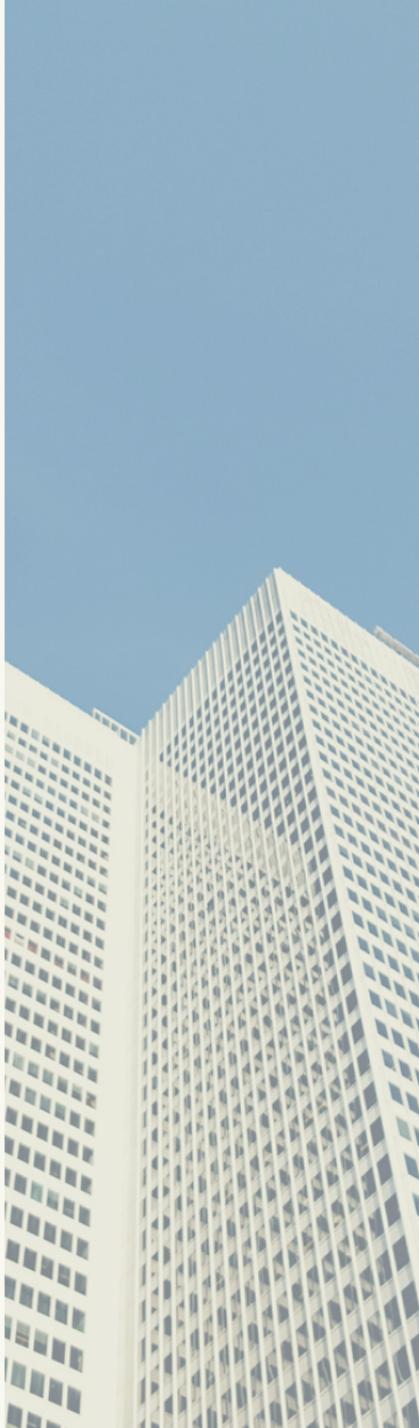
Do you thrive working independently and being responsible for your performance?

Would you enjoy working in the professional world from the convenience of your home office?

This could be the job for you:

- 15-32 hours per week (minimal hours during start-up)
- comprehensive training
- ongoing support
- opportunities for growth and development

Help others succeed with your success.



The Job

You will be in the driver's seat and responsible for filling the calendar for a successful sales team in the financial industry. You will schedule appointments with their clients and efficiently route them through their territory. You will be valued because you are doing something they don't have time to do, calling for appointments.

You will call on financial professionals, both existing and prospective clients. This is heavy phone work with some strategic emailing, so clear communication skills are a must. You will also spend some time planning and mapping, to maximize efficiencies. You are responsible for your performance. We will provide you with the training and tools; it's a win-win!

Who We Are

We are a driven, energized, enthusiastic team of planners and makers, providing premier services elevating success. Week after week, we increase connectivity with clients, expanding and deepening client bases, propelling success. And we bring heart to that hustle, because understanding and positive relationships are how we roll.

Every scheduling goal we set, territory we understand, marketing service we create, expense report we process, or call we place on behalf of our clients is the result of our team working together to make each other's ideas stronger. That happens here because every one of us strives toward a common goal — creating the best customer experiences.

Who You Are

You will master this job by: 1) managing your time, 2) asking questions, asking questions, 3) putting your training into practice, and 4) expecting success!

You are committed to being open, looking at what you are doing that is and is not working. You are willing to listen to and share feedback with the rest of the team, so we can keep upping our game.

Your personality shines, and you enjoy building relationships through the phone, in a virtual setting. You value being part of a team where you not only make a difference, but you feel the difference every day. We will invest in you, and we ask you to invest in us. Are you in? Read on...

Responsibilities

- Keep the calendar of your assigned client full of appointments
- Schedule appointments, plan travel routes and keep your team updated
- Place a high volume of outbound calls and emails to existing and prospective clients
- Multi-task at a high-level managing:
 - calendar plans and details
 - communications with numerous team members
 - several email accounts
 - various software programs: CRMs, mapping, calendars,

Google docs, etc...

- Keep notes and appointments in shared CRMs and calendars real-time
- Meet daily/weekly metrics: Setting 10-18 appointments per week, Making 18-20 calls and emails per hour. These numbers will vary by client.

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The Must-Have Details

Working in the Financial Industry mandates that extensive background checks, which can take 1-3 weeks, are completed before you are able to begin training. The training period depends upon your learning curve. You will need to demonstrate flexibility, great organization, and a knack for multi-tasking to take on multiple clients and build higher hours.

Work hours are 8:30am to 4:30pm Monday-Friday in all time zones. This is an hourly position. **Rate of pay: \$12.00-\$14.00 per hour, depending on experience.**

We are currently accepting resumes from the states listed on our website: <https://paragonplanners.com/employment>.

What is Required

- Key Characteristics: 1. High Integrity 2. Positive Attitude 3. Strong Work Ethic
- Have a competitive drive, desire to learn and grow, be self-motivated
- Accountability: Take responsibility and ownership for your results on a daily and hourly basis
- Communication: The confidence and skills to ask executives for an appointment over the phone and in an email
- Proficient computer skills in a Windows based environment. Must be able to move quickly and fluidly through multiple programs and internet browser tabs at once.
- Must be able to use email proficiently, send attachments, use signatures, copy and paste, appropriate use of cc and bcc fields
- Ability to prioritize work and multi-task effectively and efficiently
- A home office which allows for a quiet and uninterrupted work environment
- Ability to obtain and maintain a dedicated landline/VOIP line including call waiting and a customized greeting

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Computer Requirements

A desktop PC is preferred for this position. A laptop can be used if you have an external keyboard and mouse. (MAC is not compatible) The Minimum System Requirements are:

- Windows 7 and up
- Android laptops and tablets will NOT support our software: Google Chromebook and Pixelbook, Lenovo Yogabook, Samsung Tablets, etc.
- IOS tablets and mobile devices will NOT support our software: iPad, Itouch, etc.
- MAC's will NOT support our software
- 2 GB memory (4 GB preferred)
- 500 GB hard drive (at least 20 GB free hard drive disk space)
- 2.0 GHz processor (2.60 GHz preferred)
- Current anti-virus and anti-spam software. Please note McAfee and Norton Antivirus are not compatible with our software. Recommended antivirus software: Kaspersky, Webroot SecureAnywhere, Trend MicroAntivirus+, AVG, Avast.

Employment

Employees are covered under Workman's Compensation, Unemployment Insurance, and earn paid sick leave. Based on hours, employees may be eligible for a monthly expense reimbursement, health insurance benefits and 401k matching (US residents only, please).

We do not discriminate on the basis of race, color, religion, national origin, sex, age, disability, or any other status protected by law or regulation. It is our intention that all qualified applicants are given equal opportunity and that selection decisions be based on job-related factors.

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