

ASSOCIATE, CLIENT SERVICE**Reporting to:** Manager, Client Service**Department:** Client Service**Date Last Reviewed:** June 2026**About Octacom:**

Octacom is an enterprise software and services company focused on document and data management solutions. Founded in 1976 and headquartered in Richmond Hill, Ontario, Octacom specializes in document management and workflow automation software as well as document imaging and data capture services, and leverages its proprietary Odiss™ Document Management Software to provide a robust, secure and cost-effective solution to clients globally across a wide range of industries. Octacom's core solutions focus on large scale digitization and financial process automation, enabling large enterprise clients to streamline and optimize their Accounts Payable and Accounts Receivable processes.

Are you passionate about delivering exceptional client experiences and eager to contribute to a dynamic team? We're seeking a versatile Associate, Client Service to join our small but impactful team at Octacom. In this role, you'll play a key part in ensuring our clients receive outstanding support and seamless service, from onboarding new clients to managing ongoing requests and changes.

What you'll do:

As an Associate, Client Service, you'll immerse yourself in the day-to-day operations of our Client Service team, becoming a vital resource for both our clients and internal teams. Your role will involve:

- **Client Support:** Serve as the go-to contact for our clients, handling inquiries via our Hubspot-based helpdesk and resolving issues independently or by coordinating with our Client Service, Production, and IT teams as may be required.
- **Onboarding & Projects:** Assist with onboarding new clients, implementing new projects, and executing Change Requests with precision.
- **Internal Processes:** Monitor and support internal processes to ensure there are no gaps in client communication or service delivery.
- **Documentation & Communication:** Contribute to documentation, testing for new process rollouts, ensuring clear communication throughout.

Client Service & Support Activities:

- Act as the first point of contact for client support, driving efficient resolutions and managing support issues.

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- Develop a deep understanding of Octacom's services to provide informed responses and solutions.
- Manage daily and weekly processes to ensure smooth technical operations and client interactions.
- Participate in client meetings as needed and attend educational events to stay updated on industry best practices.
- Assist with collecting, analyzing, and preparing client data to support Monthly and Quarterly Business Reviews, including the development and formatting of presentation materials using approved templates.
- Work with internal and client facing-platforms to clear exceptions on behalf of clients as needed.

Administrative Duties:

- Support documentation and planning during client implementations.
- Assist with the rollout of Change Requests and resolutions to support inquiries, including planning (internal and external coordination), testing, and communication.
- Attend weekly meetings with Client Service and IT teams to stay aligned on objectives.

What you bring to the table:

- **Experience:** 1-3 years in a client-facing support or IT support role, with a desire for more client interaction.
- **Industry Knowledge:** Experience in a B2B IT environment is preferred.
- **Skills:** Excellent communication (both verbal and written), strong organizational and time management skills, attention to detail, problem-solving abilities, and project management proficiency. Ability to work collaboratively on a team. Proficiency in Microsoft Office Suite.
- **Attributes:** A proactive self-starter capable of taking accountability / ownership over tasks with a commitment to enhancing client experiences.

Additional details:

- **Type:** Full Time with benefits commencing on start-date
- **Location:** In Office, with the option for up to 1 day per week remote after probation

At Octacom, we value diversity and are committed to providing equal employment opportunities. We encourage applications from all qualified individuals, including those with disabilities. Accommodations are available upon request during the selection process.

Note: Only candidates selected for an interview will be contacted. All employment offers are contingent on background and reference checks. We adhere to the Occupational Health and Safety Act (OHSA) to ensure a safe work environment.

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