

## **Capital Ready Solutions**

An SSBCI Program of Great Lakes Women's Business Council / CEED Lending

### **Job Title: Client Specialist**

**(Part-Time)**

**Reports to:** Director of Business Education

#### **Job Overview:**

We are looking for a results-driven and detail-oriented individual to join our team as an Client Specialist. In this role, you will play a pivotal part in the success of the program by collecting basic intake information on clients, managing referrals to capital-ready vendors, tracking services rendered, performing data entry, and promoting the program.

#### **Responsibilities:**

##### 1. Client Intake:

- Review intake applications on clients to ensure accuracy in providing the information needed to understand their financing needs.
- Provide applications to review team to determine the most suitable capital-ready service providers to address the client's requirements.

##### 2. Program Enrollment:

- Enroll clients in the Capital Ready Solutions Program ensuring accurate and complete documentation.
- Provide orientation to clients with an overview of the program, its benefits, and the available services.

##### 3. Referral Management:

- Manage the referral process by coordinating with capital-ready vendors to ensure a seamless handover of clients.
- Facilitate effective communication between clients and assigned vendors.

##### 4. Service Tracking:

- Track the services rendered to clients through partner vendors.
- Ensure that clients receive the support they need in a timely and efficient manner.

##### 5. Data Entry and Reporting:

- Maintain accurate and up-to-date records of client interactions and services provided by compiling client counseling record activity from service providers.
- Generate regular reports on program activities, client progress, and service provider performance.

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### **Skills:**

- Interpersonal Skills
- Oral/Written Communications
- Organizational Skills
- Safeguarding program confidentiality
- Project Management Experience
- Strong analytical and Innovative skills
- Collaboration
- Data Management Proficiency

### **Qualifications:**

#### 1. Education:

- Some college in business administration, finance, or a related field preferred.

#### 2. Experience:

- Proven experience in customer services and/or administrative support related roles.
- Familiarity with financial services and small business support programs is a plus.

#### 3. Team Collaboration:

- Ability to collaborate with internal teams and external vendors to ensure coordinated support for clients.

If you have a passion for supporting entrepreneurs and connecting them with the resources they need, we encourage you to apply and contribute to the success of the CAPITAL READY SOLUTIONS Program.

### **Application Process:**

Submit resume to Kelly Hill [khill@greatlakeswbc.org](mailto:khill@greatlakeswbc.org). No phone calls will be accepted regarding this job posting. For additional information please reference the website, [www.greatlakeswbc.org](http://www.greatlakeswbc.org)