HSU Sponsored Programs Foundation
Job Announcement
This is not a state position

Job Title: Client Intake Specialist
Location: Arcata, CA
Hours: Full Time, 12 months/year, Non-Exempt
Wage: $18.00 to $22.00/hour. DOE

Project Name: Northern California Small Business Development Lead Center (Norcal SBDC)

Supervisor: Manager of Client Process

GENERAL INFORMATION
The Norcal SBDC is part of Humboldt State University’s Sponsored Programs Foundation. The Lead Center (headquarters) are located on campus in Arcata, CA. The program serves the business community in 36 northern counties of California with non-credit education and consulting. Funding for these programs comes from the federal Small Business Administration (SBA), and the California Governor’s Office of Economic Development (GO-Biz). Humboldt State University has hosted the SBDC program since January 2006.

The SBDC Call Center is new, established in 2019. Its purpose is to centralize the business client screening and intake processing for our 18 Service Centers located throughout northern California.

The Client Intake Specialist is a newly created, full-time, 12-month position and is non-exempt. The job offers a competitive benefits package including group health, dental, and vision. The schedule is 40 hours per week, Monday through Friday, with varied schedules/occasional weekend and evening hours. While continuation of this position is foreseen for years to come, all Norcal SBDC positions are contingent on continued federal and state funding. This is not a state or federal position. Multiple hires are anticipated with this vacancy announcement.

POSITION SUMMARY
Under the general supervision of the Manager of Client Process, the Client Intake Specialist is responsible for conducting the business client screening and supporting the management of a region-wide Call Center. This position will work closely with senior management and staff of the Service Centers to support the call-in protocol, the communication channels to individual centers and integration of screening and intake materials with the SBDC client database.

The Client Intake Specialist will help our clients to better understand the full potential of our SBDC counseling and training services.

This position will support day-to-day activities of the client intake and call center, help assure quality control, communicate frequently with the Service Centers’ staff, and aide in building and implementing online tools and resources for small businesses. The Client Intake Specialist will directly be in contact with clients and potential clients seeking SBDC services. The ideal candidate will be self-motivated, resourceful, and have strong interpersonal skills and impeccable communication skills.
ESSENTIAL FUNCTIONS & RESPONSIBILITIES

- Communicate with SBDC Center Directors about centers’ clients’ needs on an ongoing basis.
- Learn priorities of each Center and criteria for accepting potential clients.
- Conduct intake interview with potential clients applying for SBDC counseling services and create report on client assessment.
- Experience with using scheduling platforms.
- Support research and streamline client process at 18 centers, identify commonalities, and develop a set of common protocols.
- Provide help in coaching and assistance to Specialists on an ongoing basis.
- Support creation, update and use of online tools that assist in client processing.
- Aide in communicating intake updates to service centers in order to understand goals and priorities of the organization.
- Support Manager in conducting periodic surveys of clients and potential clients to ensure quality control.
- Interact with all levels of management, both internally and externally.
- Enter, modify and maintain accurate client files and records.
- Help research and compile data for statistical, financial and programmatic reports.
- Other tasks as assigned.

KNOWLEDGE, SKILLS & ABILITIES

- Excellent interpersonal skills.
- Experience working in customer service.
- Understanding of adult communication styles.
- Strong preference for small business or entrepreneurial experience.
- Experience using Microsoft Word, Excel, PowerPoint, Dropbox and Google Docs.
- Strong project management and time management, and performance skills.
- Ability to develop strong relationships and work with senior level managers.
- Very effective in written communications—technical, formal and informal.
- Strong verbal communications—one-on-one, on the phone and videoconferencing.
- Confidentiality is critical for this role.

PREFERRED QUALIFICATIONS

Preference will be given to candidates who demonstrate the following:

- Prior experience working in a customer service position/call center experience.
- Prior experience working with the small business community, economic development programs, and/or small business ownership.
- Prior experience working with confidential information preferred.
- Experience working with a CRM system such as NeoSerra.
- Ability to communicate in more than one language: Spanish preferred.

MINIMUM QUALIFICATIONS

- At least one year of experience working within the small business technical assistance/consulting field (SBDC or similar), working at a call center, or related experience.
- A Bachelor’s degree in education, communications, business or a closely related field; or an equivalent combination of training and experience.
- Must possess a valid California driver’s license.
APPLICATION PROCEDURE

Qualified applicants should submit the following items via email to Chase Kerrigan at cck24@humboldt.edu.

1. HSU application downloaded here: https://forms.humboldt.edu/hsu-employment-application
2. Cover letter
3. Résumé
4. Three professional reference contacts
5. HSU SPF Employee Information Form for Applicants: https://forms.humboldt.edu/spf-self-identification-form-job-applicants-eif-pre-offer

Initial Review Date: April 3, 2020 by 5:00pm (position is open until filled)

Humboldt State University Sponsored Programs Foundation is an Equal Opportunity /Affirmative Action Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, age, sex including sexual orientation and gender identity, national origin, disability, protected Veteran Status, or any other legally protected status. More information about HSU SPF’s Equal Employment Opportunity hiring can be found here.

For assistance with the application process, please submit an Accommodation Request Form, which can be found here or call the SPF Front Office at (707) 826-4189.