Job Title: Financial Call Center Specialist (5 openings)
Location: Sacramento Area (CURRENTLY WORK FROM HOME)
Hours: Full Time, 12 months/year, Non-Exempt
Wage: $20.00 to $30.00/hour, DOE
Project Name: Northern California Small Business Development Lead Center (Norcal SBDC)
Supervisor: Associate Director, SBDC Finance Center

GENERAL INFORMATION
The Norcal SBDC is part of Humboldt State University’s Sponsored Programs Foundation, and the SBDC Finance Center is a program of the Norcal SBDC. The SBDC Finance Center is located in Sacramento, CA and serves the business community in 36 northern counties of California with loan application assistance and other financial consulting. Funding for this program 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.

Due to increased volume of customer need, the Finance Center is expanding to include an 800 number and call center for answering businesses’ financial questions and assist with loan preparation. Most of our current work is related to COVID19 Loans for businesses.

The Financial Call Center 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. INDIVIDUALS MUST BE ABLE TO WORK FROM HOME.

POSITION SUMMARY
Under the general supervision of the Finance Center Associate Director, the Financial Call Center Specialist is responsible for conducting business client intake and answering quick questions of callers about available Small Business Administration loans, including the new COVID19 lending products. The Financial Call Center Specialist will help potential clients to better understand the full potential of our SBDC counseling and training services.

This position will support day-to-day activities of the call center, help assure quality control, communicate frequently with Associate Director of the Finance Center, and aid in building and implementing online tools and resources for small businesses. The ideal candidate will be self-motivated, resourceful, and have strong interpersonal skills and impeccable communication skills.
ESSENTIAL FUNCTIONS & RESPONSIBILITIES

- Answer quick questions about current lending products, including COVID19 loans.
- Conduct intake interview with potential clients applying for SBDC counseling services and create report on client assessment.
- Support creation, update and use of online tools that assist in client processing.
- 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

- Basic understanding of business loans and business finance.
- Excellent interpersonal skills.
- Experience working in customer service.
- Understanding of adult communication styles.
- Experience with using scheduling platforms.
- 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.
- Very effective in written communications—technical, formal and informal.
- Strong verbal communications—one-on-one, on the phone and videoconferencing.

PREFERRED QUALIFICATIONS

Preference will be given to candidates who demonstrate the following:

- Prior experience working for a bank or other lending institution.
- 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.
- Experience working with a CRM system such as NeoSerra
- Ability to communicate in more than one language: Spanish preferred.

MINIMUM QUALIFICATIONS

- Must be able to work from home.
- Must possess a valid California driver’s license.
- Must be able to work occasional evenings/weekends.

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 10, 2020 by 5:00pm (positions are 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.