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| Job Title: | **Financial Management Services Intake and Lead Administration Specialist** |
| Department: | **Community Services** |
| Reports to: | **Financial Management Services Manager** |
| Grade: | **PS** |
| Supervises: | **N/A** |
| FLSA Status: | **Non-exempt** |
| Prepared by: | **Karen Emerson** |
| Date: | **February 1, 2021** |
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| Purpose:  The FMS Intake Specialist provides a face of NMCAA to the public and positively influences the perception of the Homeownership Center’s value in the market. They will introduce clients the basics of NMCAA programming and guide them to the appropriate programs while continuing to focus on how to improve the intake process for greater client satisfaction. | |
| Essential functions:   * Continually look for ways to more effectively help our clients with intake. * Welcome and receive clients by phone, internet, email, and walk-in, answering basic questions and provide basic information and referrals using the pertinent intake forms. * Provide clients with intake packets and instructions. Assist with web-based intake with Customer Facing Technology (CFT). * Work with the Salesforce Specialist to come up with new ways to reduce manual tasks in Salesforce. * New client intake and pre-screening for programs and services based on needs and eligibility. * Appointment scheduling or provide assistance to client’s scheduling on CFT.   + Actively works to convert leads in the pipeline to service-consuming customers – must take a very sales-oriented approach to getting leads to take the next step.   + In conjunction with automated processes occurring out of Salesforce (auto-generated emails to leads via the tech), provide personalized, one-on-one outreach to leads via phone calls or emails.   + Documents lead development progress in Salesforce, including the conversion of customers as well as deactivating leads that are not viable.   + Assign ownership of leads to coaches.   + Assemble customer files. * Explain what clients need to bring to appointments and keep a record of all contacts, actions taken, and status updates using CounselorMax and Salesforce. * Enroll clients in workshop in CounselorMax (Financial Management, Homebuyer Education, Foreclosure Prevention, IDA Orientation) and Salesforce. * Process IDA application and income qualifications, assemble and give to coach. * Work directly with Lead Budget/Housing Coach and Budget/Housing Coaches to assure excellent customer service and support to coaching staff. * Assist FMS Specialist and Coordinator to bill appropriately to Matt 2 and complete TARs. * Prepare workshop area, technology, and materials. * Change signage in front of Traverse City office. * Engage customers and work during all Traverse City workshops. * Keep supplies of counseling forms, information and application packets stocked/updated on-line. * Stock flyers and forms in front hallway and reception area. * Provide clients workshop and appointment reminders by letter, phone, email, or text. * Database entry, copying and faxing. * Make sure pop can donations are kept up to date. * Post schedules and program information in the community. * Perform file reviews for different programs using a checklist. * Attend monthly FMS meetings and staff/CS meetings as required. * Filing and organizing of files and resource materials. * Provide support for marketing, advertising and promotional activities for FMS and CS with print, audio and web media. * Provide assistance for scheduling, marketing, and other duties for the Tax Program as necessary. * Attend evening/weekend workshops and set-up follow-up coach appointments with customers. * Recruit and engage FMS volunteers. * Keep volunteer activities updated. | |
| Position Objectives:   * To meet the needs of clients as well as provide support to FMS coaches, FMS technician, and management. * To ensure that all work is completed accurately and in a timely manner. * To represent the agency in a professional friendly, and caring manner. | |
| **Measured by:**   * The accuracy and timeliness of completed work. * The quality of work produced. * Cooperation with and feedback from clients and co-workers. * The ability to represent the agency professionally and efficiently service clients. * Conversion rate of leads to agency customers. | |
| **Minimum Education:**   * Bachelor’s degree or equivalent preferred. | |
| **Minimum Experience:**   * No experience necessary, although 1 to 2 years’ experience in an office, receptionist, or customer service setting preferred. | |
| **Essential Abilities:**   * A commitment to the NMCAA philosophy and mission. * Ability to maintain confidentiality. * Ability to interact positively with co-workers and clients in a non-judgmental, tactful and courteous manner. * Ability to suggest innovative approaches in completing job responsibilities. * Ability to work openly and cooperatively as a team member. * Ability to perform physical tasks to carry out specific job duties. | |
| **Minimum Skills Required:**   * Excellent customer service, sales, and interpersonal communication skills. * Operation of a multi-line telephone system, database, and computer skills. * Strong organizational skills with the ability to pay attention to detail. * Ability to handle multiple tasks with multiple interruptions. * Strong listening skills with the ability to understand and carry-out directions. * Ability to quickly grasp new databases and technology. * Ability to handle a large volume of calls. | |
| **Minimum Physical Expectations:**   * Physical activity that always involves keyboarding, sitting, phone work, and filing. * Physical activity that often requires extensive time working on a computer. | |
| **Minimum Environmental Expectations:**  The FMS Intake Specialist position operates in an office setting. This role routinely uses standard office equipment such as computers, phones, photocopiers, filing cabinets and fax machines. | |