

**JOB TITLE:** Intake Coordinator

**DEPARTMENT:** Domestic Programs

**REPORTS TO:** Project Director

**PAY RANGE:** Depending on Experience

### **POSITION OVERVIEW**

The Southwest Small Business Transportation Resource Center (SBTRC), funded under the U.S. Department of Transportation and operated by the California Asian Chamber of Commerce, supports the capacity for small disadvantaged businesses to bid and perform on transportation and construction projects. The Intake Coordinator is responsible for enrolling new clients to the SBTRC program by completing the appropriate program enrollment documents. This position will be responsible for intake support of new and existing client inquiries, using the CRM System (NeoSerra). The Coordinator will be responsible for responding to email and phone inquiries, and thoroughly inputting new client data into Neoserra.

The Intake Coordinator is also responsible for the outreach and promotion of workshops, events, and opportunities hosted by the organization. Outreach channels include the use of newsletter and social media platforms (Facebook, Instagram, LinkedIn and Twitter). The Intake Coordinator will support the Project Director and Program Officer to ensure all project activities within the SBTRC Program is implemented effectively and efficiently, and all goals successfully met.

### **KEY RESPONSIBILITIES**

- Provides friendly, courteous, positive and high-quality service as first point of contact to potential clients and existing clients;
- Maintain confidential, accurate and complete files for all program participants;
- Outreach to event participants and assist them in the completion of the entire client intake process;
- Maintain ongoing communication with existing clients through email outreach and occasional calls;
- Demonstrates exceptional organizational, planning and multi-tasking skills;
- Research and counsel participants regarding services offered through the SBTRC program and make appropriate referrals to other programs or partner agencies;
- Ensure accurate and timely entry into NeoSerra database;
- Assist with outreach efforts to keep participants actively engaged in the program and to ensure follow through on intake form submission;
- Create outreach content for newsletters, social media, and marketing material;
- Work closely with the Director and Program Officer in accomplishing the engagement for the Bonding and Contracting Education Program (BEP).

## **CLIENT ENGAGEMENT & CUSTOMER SERVICE**

- Follow up on small business client leads to provide intake for participation in the organizations programs, such as the Bonding and Contracting Education Program (BEP);
- Conduct research for clients by connecting them to appropriate resources, technical assistance (bonding, loan assistance, procurement opportunities), and subject matter experts to support the needs and goals of small business owners;
- Work with consultants, subject matter experts, and chamber partners to identify solutions and technical assistance to help small businesses succeed in their operations and bonding goals.

## **REQUIRED SKILLS AND QUALIFICATIONS**

### **Education**

University degree preferred. College experience may be substituted for sufficient, related work experience.

### **Knowledge & Skills**

- Outstanding attention to detail and results oriented;
- Excellent communication and critical thinking skill;
- Excellent organization skills with experience in project coordination, planning, and implementing events/activities;
- Flexible, creative, and able to work under pressure and meet tight deadlines;
- Excellent interpersonal skills and high emotional intelligence;
- Proficient in Microsoft Office and the ability to use multiple databases to run reports and enter data.

### **Experience**

- Experience with data collection and research to develop impact reports highly desired
- Experience with designing marketing materials for events and services highly desired (e.g. Canva)
- Proficiency in Windows-based software and willingness to learn CRM software

The Sacramento and California Asian Pacific Chamber(s) of Commerce are the largest ethnic chambers in California serving the Sacramento region, and the State of California's 600,000 API owned businesses. Both chambers are focused on providing consulting and technical assistance services for both domestic and international minority owned business clients to help them start, grow and expand into California Next Economy and compete effectively both domestically and globally.

## **APPLICATION PROCESS:**

Position open until filled. Submit CV with cover letter by email to [SBTRCsouthwest@calasiancc.org](mailto:SBTRCsouthwest@calasiancc.org).

Need position filled immediately.



@calasian\_chamber



@calasiancc



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CalAsian Chamber