

**SOUTHWEST MINNESOTA HOUSING PARTNERSHIP
(SWMHP)**

Job Title: Client Services Coordinator

Supervisor: Director of Homeownership Services

Classification: Non-Exempt

Approval Date: February 7, 2025

SUMMARY:

This position is responsible for assisting the Lending Specialist in providing management and administrative duties for Homeownership Service programs of the Southwest Minnesota Housing Partnership. This role creates the first impression for the customer experience, acting as the initial point of contact and assisting customers to take advantage of our programs. As our customer navigator, the Client Services Coordinator drives the intake process. The position will work directly with customers as needed to complete the intake process. The position will be responsible for reviewing applications, maintaining tracking of projects and contacting clients. Other efforts include preparing reports, gathering pertinent documentation and recording loan documents. This position will manage the intake of SWMHP Homeownership programs. This position also plays a vital role in supporting outreach activities and will act as the SWMHP Salesforce Champion within the organization.

To be amazing in this role, you will lead the way for our customers to have excellent customer experience. You are welcoming and engaging and excited to call customers back to get them started on their Homeownership Services journey. You are a connector, eager to get out into the community and be an ambassador for our organization and services. Finally, you are resourceful and feel comfortable with technology as well as managing the details of a busy office.

Required

- Customer focused, with strong written and verbal communication skills.
- Strong working knowledge of the Microsoft Office suite of applications.
- Strong technological aptitude with the ability to train staff on office equipment and tools.
- Ability to handle simple to moderate mathematical calculations
- Detail-orientated, with a passion to learn new skills and techniques to promote efficiency and successful customer and process outcomes.
- Ability to identify areas of improvement for processes, policies and procedures
- Flexible, with the ability to manage multiple tasks in high volume work environment.
- Ability to work effectively in a culturally diverse community.

Desired

- A minimum of two years' relevant experience
- Previous reception, office management or other office support experience.
- Experience with Salesforce CRM or similar technology.
- Demonstrated time management skills.
- Passion for the mission of the organization.
- Fluency in two or more languages (including English).

PRINCIPAL JOB DUTIES AND RESPONSIBILITIES:

Customer Intake: Manage the intake process to ensure maximum efficiency. Determine that all documentation has been submitted and meets minimal program standards. Transfer applications into multiple Client Management Systems. Contact customers with incomplete intake packages to submit additional information. Answer basic programmatic questions. Assign customer to Homeownership Services staff.

Loan Processing: Prepare standardized loan documents for SWMHP lending programs. Maintain loan documents so that they are easily accessible and establish a periodic review schedule. Prepare loan documents as required for each transaction.

Customer Database: Supervise and manage the use of the organization's customer database. Work with other staff identified to devise a systematic and efficient approach to entering and retrieving data. Maintain a database or spreadsheet of all products offered or managed by the organization by project.

Record Keeping: Maintain thorough and accurate records, according to the policies of the organization and related partners, regarding each project.

Closing Agent: Manage the loan documents required to properly secure funds for either the organization or its funder. Coordinate closings with owners, manage fees, and ensure accuracy of documents. Coordinate the recording and collection of documents.

Grant Reporting: Prepare reports required by funding agencies, as necessary, and in conjunction with the Program and Lending Manager and Director of Homeownership Services.

General Administrative Duties: Perform general administrative duties as needed and assist other Homeownership Services staff when requested.

Community Representation: Represent the Southwest Minnesota Housing Partnership in communities, counties, state and federal organizations, foundations and all other public activities at the direction of the CEO, COO, or the position's Supervisor.

Hours: Work primarily daytime office hours during the week but will be expected to work a flexible schedule including evening hours and weekends to accommodate customer needs and deadlines.

Travel: Travel within the region frequently (weekly), within the State Minnesota occasionally (monthly), and will travel out of state as needed for training and other staff development opportunities. Must be willing to drive company vehicles or personal vehicle as required.

Lifting: Lift more than 50 pounds on occasion

DISCLAIMER AND APPROVAL

The above statements are intended to describe the general nature and level of work performed by employees assigned to this position. They are not intended to be an exhaustive list of all duties, responsibilities, and qualifications. Management reserves the right to change or modify such duties as required. This position will perform other duties as assigned by the position's Supervisor and the Chief Executive Officer. Reasonable accommodations may be made to enable individuals with disabilities to perform the assigned and essential functions.

Employee Acknowledgment:

Signature

Date

Employer Acknowledgment:

Signature

Date