



## Customer Care Specialist Job Description

**Location:** *Hybrid-Remote, Fort Bragg or Ukiah Office (3 days in office/2 remote)*

**Position:** *Full-time, Non-Exempt*

**Salary:** *\$25-\$27/hr, DOE*

**Organization Overview:** West Business Development Center (West Center) is a 501(c)(3) nonprofit organization providing business technical assistance and economic development services across Mendocino, Lake, and Sonoma Counties and adjacent Tribal Lands. We host both the Mendocino Small Business Development Center (SBDC) and the Mendocino Women's Business Center (WBC). Our mission is to advance rural economic prosperity by partnering with entrepreneurs and communities to drive business growth. We collaborate with businesses, government agencies, sponsors, and grantors to leverage and nurture the extraordinary entrepreneurial spirit of rural Northern California. Our work provides equal access to resources to all individuals who seek to start or expand their business. Our Core Values are: Inclusiveness, Optimism, Respect, Collaboration, and Integrity.

**Position Overview:** The Customer Care Specialist meets new or prospective clients primarily on the phone and occasionally in person. The Specialist will ask a series of questions for the purpose of compiling data, and then will utilize this data to determine the best next course of action for that client. After capturing the appropriate client data, the Specialist will be responsible for the accurate input of data into West Center's client database, assign the client to a Client Services Manager, and schedule the first counseling appointment. Following completion of the call or in-person contact, the Specialist will record the orientation session and send the necessary client information forms to the appropriate Advisor. The Customer Care Specialist also follows up with clients who have a lapse in contact with West Center to understand what causes the lapse and strive to reengage the client.

### Key Responsibilities:

- Answers company phone and logs or returns calls from 9:00 A.M. to 4:00 P.M. Monday to Friday.
- Schedules and conducts orientation sessions with prospective clients, obtaining pertinent information from prospective clients in a courteous, professional manner.
- Accurately enters session notes into database including a detailed description of client's business information, vision, goals, and actions taken or required.
- Transmits required documentation to Business Advisors, including scheduling the first counseling session using Calendly.
- Processes paperwork for new clients efficiently and in accordance with protocols.
- Determines client progress and captures client successes within client record.
- Conducts periodic surveys and analyzes data collected and provides feedback to staff and advisors for improving customer service.
- Follows up with clients experiencing a lapse in counseling to determine cause and reengage clients.
- Receives and processes referrals from centralized intake team.
- Follows up with clients regarding required government certification information.

- Accurately enters contact and/or client data into West Center's database, spreadsheets, and /or google docs.
- Learns and effectively conveys West Center policies and procedures.
- Attends company functions and client programs in person, as needed.
- Other responsibilities may be added as the individual develops within the role or as the organization requires.

**Skills, Knowledge, and Abilities:**

- Communicates effectively in both English and Spanish, both orally and in writing, with individuals from diverse backgrounds and abilities.
- Demonstrates comfort with virtual meeting software, including Zoom, Microsoft Teams, and Calendly.
- Utilizes Windows Office Suite proficiently, with a focus on Microsoft Word and Microsoft Excel.
- Works efficiently within Google Workspace to schedule tasks, email, communicate, create reports, and maintain records.
- Maintains strict client confidentiality.
- Establishes immediate rapport with prospective clients, creating a welcoming and friendly atmosphere.
- Exhibits active listening skills, paying close attention to details and recording information quickly and accurately.
- Shows a desire to learn new skills to support client development.
- Manages workload effectively to ensure responsibilities are completed in a timely manner.
- Collaborates with a diverse group of staff members, clients, board members, and the public to promote client and organizational success.
- Thinks critically and innovatively to solve problems.

**Education and Experience:**

- High school diploma or equivalent; some college or professional development coursework preferred.
- 2+ years of customer service experience working with the public both in person and on the phone.
- Proficient with Microsoft (Word and Excel) & Google Suite (Gmail, Calendar, Docs)
- Strong knowledge of the rules of grammar.

**Benefits:** Paid PTO; Paid Sick Leave; Paid Holidays; Monthly Health Stipend; Cell Phone & Internet Reimbursement (partial); 3% Monthly Retirement Contributions.

**Work Environment:** This position can be based in either the Fort Bragg or Ukiah office with the understanding there may be regular travel between offices. Reliable transportation is required. Evening and weekend work may be required for workshops, meetings, and other West Center programs.

Regularly sits or stands for long periods at a computer; frequently bends, twists, stoops and crouches while working at desk, filing and records handling; constantly uses both hands/arms in reaching, handling, grasping, and keyboarding while using a variety of office equipment; frequently uses a telephone and computer to communicate with coworkers and public; regularly stands to use a variety of office equipment; occasionally lifts and carries items up to 30 pounds; occasionally lifts above shoulder and head; regularly communicates in oral and written form with co-workers and with the general public, frequently reads and interprets agreements and other documents. Constant sitting in an office chair, keyboarding and visual contact with computer terminal; frequent walking, standing, writing, bending, and reaching; occasional lifting of items

weighing less than 30 pounds, reaching and lifting above shoulders, carrying boxes of materials from place to another.

**To Apply:** Please send a cover letter and resume to [julia@westcenter.org](mailto:julia@westcenter.org).

*West Business Development Center is an equal opportunity employer and encourages people from all backgrounds to apply. Funding for this program comes primarily from the federal Small Business Administration (SBA), and the California Governor's Office of Economic Development (GO-Biz), along with other state and private grants.*