



Job Description for Client Manager for Sonoma Small Business Development Center

Job Title: Bilingual Client Manager

Hours: Part-time, Non-Exempt

Location: Santa Rosa Metro Chamber

Wage: \$22.00 per hour

Supervisor: Director

**General Information:** The Sonoma SBDC is a new center, located in the building of its new host, the Santa Rosa Metro Chamber and has been operating for one year. The SBDC serves the business community in Sonoma County with non-credit education and one-on-one business advising. Funding for this program comes from the Small Business Administration (SBA), the Governor's Office of Economic Development (GO-Biz) and the host, the Santa Rosa Metro Chamber. While the position is assigned to the Sonoma SBDC, the successful candidate will be an employee of the Santa Rosa Metro Chamber.

The Sonoma SBDC Client Manager is a newly created part-time, non-exempt position with limited benefits. The schedule is up to 30 hours per week, Monday through Friday, with varied schedules, occasional evening hours for training and events. While continuation of this position is foreseen for years to come, all SBDC positions are contingent on continued federal and state funding. This is not a state or federal position.

**Position Summary:** Under the supervision of the Director with an immediate supervisor of the Program Coordinator. The Client Manager is responsible for overseeing the intake of new SBDC clients, assigning them to their advisor, assisting them with other SBDC resources and supporting them through their SBDC experience. A key part of this position will be not only supporting SBDC clients but also expectations of our partners as they refer clients to us. This position is usually the first point of contact with our organization, therefore, this position is bilingual English/Spanish and requires a high level of excellent customer service skills.

Additional tasks include monitoring various client lists, conducting intakes, monthly reconciliation, answering calls, monitoring emails, scheduling meetings and appointments, conducting client surveys and coordinating resources for clients and attending internal meetings, training and events.

**Skills and Abilities:**

Excellent interpersonal skills

Experience working in customer service

Strong communication skills/bilingual

Strong preference for small business or entrepreneurial experience

Experience using Microsoft Word, Excel, PowerPoint, Google Docs, Scheduling

Software, Zoom

Strong project management, time management, and performance skills

Ability to communicate and work well with senior level managers

Very effective in written communications—technical, formal and informal.

Strong Bilingual verbal communications—one-on-one, on the phone and video

Confidentiality is critical for this role.

**Preferred Qualifications:**

Preference will be given to candidates who demonstrate the following:

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 businesses

Prior experience working with confidential information

Experience working with a CRM system such as NeoSerra

Ability to communicate in more than one language: Spanish preferred

**Minimum Qualifications:**

At least one year of experience working with Small Business

At least two years of experience working in customer service or hospitality

A Bachelor's degree in education, communications, business or a closely related field; or equivalent combination of training and experience

Must possess a valid California driver's license and pass a background check

Qualified applicants should submit the following items via email to [info@sonomaSBDC.org](mailto:info@sonomaSBDC.org) with Client Management Rockstar in the subject line

1. Cover Letter
2. Resume
3. 3 professional references

This position will remain open until filled