

New Clients Coordinator (1.0 FTE)

JOB DESCRIPTION

This job description describes the tasks that will be required of the job holder but does not form a part of the job holder's Employment Agreement. Also, to ensure that the role continues to best serve CAP's Mission the JD may be updated. Therefore, flexibility on the part of the job holder is required.

Location of the Role

CAP Head Office, Penrose, Auckland

Purpose of the Role

As part of the New Clients Team, the purpose of this role is to carry out a range of administration and support tasks to ensure that a smooth onboarding of clients with CAP's debt help service. This role requires excellent attention to detail, a mix of organizational and interpersonal skills, and is also designed to provide a promotion pathway to a Budget Solutions Adviser role within the Client Set Up Team, which forms a part of the wider New Clients Team.

Key Relationships

Department: Client Services

Direct Manager: New Clients Team Leader

Direct Reports: None

Key Internal Relationships: Client Services & Frontline Delivery Department
Work collaboratively with our client-facing Head Office teams, as well as with debt coaches and regional managers across Aotearoa to ensure that clients are well established for their journey out of debt.

Key External Relationships: Potential debt help clients
All other external parties who enquire with CAP
Creditors

Summary of Role Accountabilities

- 1) Maintaining an attitude in line with CAP values that demonstrates both professionalism and compassion, competently navigate all incoming enquiries of differing communication channels, ensuring that as many people who are after CAP's debt help are booked in accurately.**
- 2) Accurately run daily, weekly and monthly reports needed for data analysis, which will help inform the way forwards for CAP.**
- 3) With pace and accuracy, process information and paperwork submitted for client accounts, to enable the progression of the client's journey to becoming debt free.**

4) Be an active participant in organisation-wide meetings, events, and activities.

Role Accountabilities on a Day-to-day Level

Note: For all accountabilities, Performance Indicators and/or Measurable Outputs will be discussed and agreed at the time of appointment.

- 1) Maintaining an attitude in line with CAP values that demonstrates both professionalism and compassion, competently navigate all incoming enquiries of differing communication channels, ensuring that as many people who are after CAP's debt help are booked in accurately.**
 - All new client enquiries are worked through and responded to in a timely manner, demonstrating consistency by accurately following processes. For people who are enquiring about CAP's debt help service, this will involve working through either a detailed booking process using CAP's systems, or a decline and referral process.
 - Offer to, and pray for all new clients who get booked in with CAP's debt help service.
 - Where necessary, proactively engage and communicate with debt coaches and regional managers (Frontline Delivery Department) in a timely and collaborative manner.

- 2) Accurately run daily, weekly and monthly reports needed for data analysis, which will help inform the way forwards for CAP.**
 - Self manage the actioning of daily, weekly and monthly reports needed for data analysis, ensuring that the report is accurate and completed in a timely manner.
 - Provide support and insights as necessary, to aid both the accurate collection and analysis of the data collected.

- 3) With pace and accuracy, process information and paperwork submitted for client accounts, to enable the progression of the client's journey to becoming debt free.**
 - Check, process, compile, and upload to CAP's systems, all information and paperwork submitted for client accounts to confirm whether or not we can progress to the next stage of creating the client's budget to assess their financial situation.
 - Maintain and update relevant spreadsheets to ensure accurate tracking of client accounts.
 - Where necessary, proactively engage and communicate with debt coaches and regional managers (Frontline Delivery Department) in a timely and collaborative manner.
 - Where necessary, correspond with creditors in a timely and professional manner.
- 4) Be an active participant in both team and organisation-wide discussions, events, and activities.**
 - Actively participate in praying with colleagues for the work of CAP and our clients.
 - Actively participate in organisation-wide events and activities.
 - Assist with 3-4 Church Talks per year, either by speaking or supporting the talk.
 - Engage in Te Ao Māori learning and development opportunities, including within CAP.

Requirements of the Role

- A strong personal alignment with the foundational Christian philosophy of CAP and a willingness to pray and demonstrate the Christian gospel with various stakeholders.
- A passion to see individuals and families across Aotearoa set free from debt and poverty.
- A willingness to engage with various stakeholders in a way that honours Te Tiriti o Waitangi.

- Holds self to strong work ethics.
- Will work proactively and collaboratively as part of a team.

Skills, Knowledge, Expertise & Experience:

- Clear written and verbal communication skills, as well as an excellent phone manner that demonstrates professionalism, empathy, and cultural competence, with the ability to navigate difficult conversations.
- Able to pay attention to detail, while also demonstrating big picture thinking.
- Able to swiftly learn, grasp, understand, and accurately action a range of processes and ideas to differing situations.
- Able to demonstrate a good balance between methodical and creative thinking.
- Able to work at pace with accuracy and efficiency.
- Effectively manage competing needs to ensure that tasks are completed in a timely manner and in doing so, demonstrate excellent flexibility and adaptability where necessary.
- Able to self-motivate with high awareness of self.
- Able to work both independently and collaboratively with others towards achieving a shared goal.
- Able to respectfully and optimistically, receive and provide feedback.
- Recognises opportunities for improvement in processes and will initiate and drive change where appropriate.
- Competent Microsoft Office (including excel), Adobe and computer skills.

Education and Qualifications:

- Level 3 NCEA in both Mathematics and English, or the equivalent in either CIE or IB.
- Ideally, a relevant qualification at tertiary level for progression into the Budget Solutions Adviser role.

Job description prepared by: Joan Lee

Last Updated: August 2022

Statement of Acceptance

The Employee will perform the duties set out in this Job Description. These duties may be modified and updated by the Employer from time to time following consultation with the Employee. The Employee also agrees to perform all other reasonable duties and comply with reasonable instructions issued by the Employer.

I confirm that I have read and understand this Job Description, and agree to abide by the duties, tasks and accountabilities within it.

Signature:

Date:

Name: