

New Clients Coordinator

(FTE 1.0)

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. This Job Description is likely to change from time to time, to ensure that the role continues to best serve CAP's values, vision and impact model. Therefore, flexibility on the part of the job holder is required.

Location of the Role

CAP Support office, Auckland

Hours of work

8.45am to 5pm

Purpose of the Role

The New Clients Coordinator contributes to positive outcomes for clients by connecting clients to CAP's Debt Help service and a local CAP Coach.

Key Relationships

Department: Services Department – Partner Services and Support

Reports to: Head of Partner Services and Support

Direct Reports: None

Key Internal Relationships: Partner Services & Support Team
Client Services Teams

Key External Relationships: Clients
Coaches
Referral Agencies

Summary of Role Accountabilities

- 1) Manage all enquiries received by the New Clients Coordinators
- 2) Collaborate effectively to ensure that clients and coaches are well-set up for their first interactions
- 3) Champion and actively participate in organisation-wide rhythms and initiatives

Role Accountabilities on a day-to-day level

- 1. Manage all enquiries received by the New Clients Coordinators**
 - Confidently respond to all incoming calls (including voicemails), emails, and website enquiries from callers in a timely manner, ensuring a high standard of professionalism and care is demonstrated at all times
 - Provide sound and accurate advice regarding CAP's services
 - Identify and ensure that potential clients that fit the criteria for CAP's Debt Help service

- are booked in accurately and in a timely manner
- Be well informed and keep up to date with products and services that might serve enquiries as referral options
- Skilfully respond and navigate difficult conversations, providing appropriate advice for each unique situation and escalate as required
- Demonstrate professionalism and appropriate boundaries at all times
- Skilfully identify and understand the needs of potential clients to ascertain whether the Debt Help service is suitable for clients or if referrals are needed elsewhere
- Reflect key CAP frameworks in interactions with clients, including the Quality of Debt Solutions
- Offer prayer where appropriate, and in line with CAP's approach to Gospel Engagement

Performance Indicators or Measurable Outputs:

- KPIs relating to new enquiries delivery and effectiveness
- KPIs relating to client outcomes and experience

2. Collaborate effectively to ensure that clients and coaches are well-set up for their first interactions

- Build and maintain strong relationships with clients so that they feel well-informed and equipped for their next steps with CAP and with coaches, ensuring client-centred approaches are applied, including the Quality of Debt Solutions framework
- Build and maintain strong relationships with coaches so that they feel well-informed and equipped for their first interactions with clients
- Coordinate the needs of clients and coaches so that visits are booked with consideration
- Ensure relationships remain healthy with external referrers and service providers by managing referrals with care
- Accurately surface and report data so that Partner Services + Support Team are aware of relevant client booking data
- Communicate with professionalism, care, accuracy and timeliness to all stakeholders
- Maintain a posture of accountability and support while working with different stakeholders

Performance Indicators or Measurable Outputs could include:

- Health check indicators for internal relationships, including pulse checks and stakeholder surveys
- KPIs and reporting relating to coach and client outcomes and experience

3. Champion and actively participate in organisation-wide rhythms and initiatives

Pertaining to Organisational Identity & Culture:

- Participate in daily and weekly prayer meetings with colleagues for the work of CAP and its clients
- Attend, and sometimes present at, conferences and away days to learn and grow in the work together with colleagues
- Participate in Te Ao Māori learning and development opportunities, including within CAP, that reflect CAP's bicultural position and requirements of the role

Pertaining to Donor Relations:

- Regularly invite personal contacts to contribute to CAP's 'Life Changer' regular giving program and participate in office activities to this end, including an annual thankyou calling evening.
- Help out with 1-2 CAP Church Talks per year around Aotearoa, either by supporting or doing the talk.

Performance Indicators or Measurable Outputs:

- Consistently participates in all of the above listed activities

Requirements of the Role

Personal attributes & values

- A strong personal alignment with the foundational Christian philosophy, organisational identity, culture, and values of CAP
- Ability to work with many different faith expressions, where-ever they are on the spectrum of conservative to charismatic
- Ability to work and lead comfortably and well in an NFP organisation that seeks to honour Te Tiriti o Waitangi in the way work is done
- Ability to work comfortably and well in an environment which demonstrates the Christian gospel with stakeholders, shares about Jesus Christ as appropriate, and prays
- Ability to balance empathy, compassion, professionalism and best practice, and to lead others to do the same
- Ability to confidently work with vulnerable people
- Ability to safely and sensitively engage with people from different cultures & backgrounds
- Ability to work under time pressure, and a willingness to work evenings and weekends when required
- Ability to work well in an environment that is undergoing purposeful and significant change and able to champion change and transformation

Skills, knowledge & experience

- 12+ months experience in a similar role
- 1-2 years proven experience working in client-centred service delivery and/or with community-based social issues
- Familiarity with financial institutions, systems and practices in Aotearoa
- Strong numeracy and literacy skills
- Excellent attention to detail
- Sound technical skills, and experience using database and information systems
- A strong growth, developmental and learning mindset, and mode of practice
- Able to notice improvement opportunities in existing processes and initiate projects or improvements
- Strong time management with a capacity for large workloads, and an attitude of completion
- Strong skills in working collaboratively to maximise service delivery effectiveness and client experience outcomes
- Strong communication, both written and verbal, in both formal and informal contexts
- Able to problem solve and to operate with a solutions-focussed approach

- Proven ability to handle sensitive information with discretion and maintain strict confidentiality

Qualifications

- Relevant qualification at tertiary level (desirable)

Job description prepared by: Esther Greenwood

Last Updated: April 2026

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: