



## COMMUNITY FIRST FUND TEAM MEMBER PROFILE

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Date: 08/2021

Name: Vacant

Position/Title: Lending Support Specialist

Department: Lending Reports To: TBD

Salary Band: Core Operations

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### CHARACTERISTICS

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- Organized/ Efficient
- Approachable
- Analytical
- Independent/ Self-motivated
- Ethical
- Goal Oriented
- Inclusive
- Detail Oriented
- Multi-tasking
- Conscientious
- Outgoing
- Performs well in a fast paced work environment
- Supportive
- Positive
- Customer Focused

### SKILLS

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- Proficiency in Microsoft Products; with strong skills in Excel.
- Capacity to learn departmental software systems and databases, including but not limited to Customer Relationship Management software, On-line application (SPARK), The Exceptional Assistant (TEA) and cloud based programs like Microsoft 365 and Power BI.
- The ability to maintain a high degree of accuracy and attention to detail.
- Ability to work independently.
- Strong written and verbal communication skills.
- Strong analytical skills.
- Ability to grasp general accounting and financial concepts.
- Ability to work effectively with racially and socially diverse individuals.
- Spanish speaking required.

### EXPERIENCE

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- Associates degree or related experience.
  - Two years previous lending or lending support experience preferred.
  - Two years of customer service experience including use of a customer service data base.
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**ROLE:** Through a working knowledge of CFF loan products and financial concepts, provide sales, service, and portfolio support to the commercial lending team. Perform administrative duties that assist with document collection and closing.

**RESPONSIBILITIES:**

1. On-line application (SPARK) leads
2. Outbound marketing
3. Customer and sales (CRM) management
4. Portfolio management
5. Document collection and closing
6. Problem loan management
7. Individual, team and company participation

**EXPECTATIONS:**

1. SPARK leads
  - a. Immediately contact all leads generated through SPARK
  - b. Prescreen client and prequalify the borrowers loan readiness
  - c. For qualified leads prepare package and work with client to begin the application process and upload required documentation
  - d. Assign appropriate lender to continue client application to prepare for underwriting
  - e. For unqualified leads determine best technical assistance options and make referrals
2. Outbound marketing
  - a. Work with the marketing department to generate databases from CRM for lead generation
  - b. Promptly follow-up with leads that are generated outside of SPARK
  - c. Establish a SPARK relationship with outside leads
3. CRM management
  - a. Use Microsoft Dynamics to manage pipeline
  - b. Assure all client contacts are recorded
  - c. Assist in obtaining required compliance information from clients
4. Portfolio management
  - a. Contact clients regularly according to technical assistance expectations and document in CRM
  - b. Work with loan administration and client to obtain timely financial reporting records and impact data, and record in TEA
  - c. Monitor and identify maturing loans and work with client, lender, and loan administration to determine additional financing needs
  - d. Service client requested operational issues

5. Document collection and closing
  - a. Work with loan administration to determine a document schedule
  - b. Work with clients to procure required closing document
6. Problem loan management
  - a. Follow-up with assigned clients on return ACH items
  - b. Ensure payment arrangements are met by clients
  - c. Review delinquency reports regularly and follow-up with clients
7. Individual, team, and company participation
  - a. Quarterly coaching sessions and annual review meeting
  - b. Department meetings
  - c. Loan committee (as appropriate)
  - d. Opportunities Meeting, Quarterly Business Meeting
  - e. Participate in training, surveys, and assessments as directed
  - f. Special events attendance & support

### **Physical Demands**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee is frequently required to stand, sit, talk and hear.
- The employee is occasionally required to move about the office; use hands and fingers to feel, handle, or operate office equipment.
- Specific vision abilities required by this job include close vision and the ability to adjust focus.

### **Work Environment**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- The work is performed primarily in an office or client business setting. The noise level in the work environment is moderate.
- Travel in a wide geographic area is required approximately 30% of the time. Employee must hold a valid driver's license and be able to drive and travel outside of the office for meetings, conferences, client visits and other job-related commitments.



*The duties listed above are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position. The team member profile does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.*