



## Job Opening: Client Manager - Oakland

### Background

AnewAmerica is a 22 yr. old non-profit 501(c)(3) that provides training, business incubation and technical assistance to targeted communities for economic and social empowerment through a focus on entrepreneurship, asset building, social responsibility and civic engagement. We work with traditionally challenged communities, which include new Americans (new citizens, refugees and immigrants), women, minorities and low to moderate income households, to empower them to make their American dream a reality while contributing to the economic growth and social capital of their communities.

### Position Summary

The Client Manager works under the supervision of the Women's Business Center Director located in San Jose, California. The Client Manager works with a portfolio of entrepreneurs and small businesses to provide consultative business support and business assistance services. The Client Manager is responsible for accurately recording and tracking metrics of client progress as prescribed by the organization. The individual will need to have the ability to deliver our basic training curriculum and successfully coach entrepreneurs and refer them to appropriate resources as needed. The Client Manager will possess the ability to work with diverse populations and underserved communities in support of our mission.

### Qualifications

- A background in business, program management, marketing, banking or financial management with at least 2 years of direct experience in the private or non-profit sector.
- Degree in Business Administration, Marketing, Economics, Finance, Accounting, or equivalent professional experience.
- 1-2 years of experience in business planning, business development, consulting, small business counseling and /or portfolio management.
- Excellent writing and verbal communication skills.
- Bilingual (Spanish/English, Vietnamese/English or Chinese/English). (Highly Desirable)
- Experience working with businesses in various industries. (desirable)
- The ability to read and interpret policies and procedures related to programs, processes and execute on the information.
- The ability to accurately and consistently complete required client forms, track client

milestones and progress and related tracking forms as assigned.

- Ability to work with diverse populations in a manner that gains trust.
- Strong analytical, math and financial skills.
- Passion for economic and social empowerment for microenterprises and small business owners and entrepreneurs representing underserved communities.
- Computer literacy is required, being adept using PCs with a Microsoft Office Suite (especially Excel), Adobe products, and internet research.
- Market knowledge of the Oakland area’s business and residential communities is desirable.

### Key Role & Responsibilities

This position is a portfolio management and relationship management role in a small non-profit organization. The Client Manager is responsible for working with assigned clients over a period of time to coach, advise and position them for business success. The role encompasses coaching and training on various aspects of opening, sustaining and growing a small business enterprise. In addition, the Client Manager is expected to use required tracking and monitoring tools to document, measure and report the progress of clients in their portfolio. The Client Manager also needs to have the ability to conduct business development and work with external and internal stakeholders to develop participants for our services. Key skills and abilities for a successful Client Manager include:

- Strong interpersonal skills and the ability to work with/support a diverse base of clients.
  - Provide business support and client management advice to assigned small business clients.
  - Work one on one with small business owners to help them execute their business plans and strategies for the effective launch or expansion of their business.
  - Maintain and retain detailed records of consultations, and outcomes for each business entrepreneur assisted. Track changes in business revenue, changes in profit, job creations, and asset development.
  - Focus on supporting clients to develop and implement robust business plans, build effective and sustainable business models, be responsive to customer demand, embed financial management systems, and develop marketing plans and appropriate management systems.
  - Work closely with external and internal stakeholders.
    - Manage small business clients in all business stages. (start-up, existing, and expansion)
  - Provide program support; establish and maintain relationships with entrepreneurs, collaborate with AnewAmerica staff and team by providing outreach within our

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communities, and work with our staff to ensure all program targets and goals are met.

- Work with clients on and off site. (Must be able to work occasional evenings and weekends)
- Provide AnewAmerica Business Incubation Training and other assigned training as needed.

The ability and desire to conduct business development and market outreach activities as assigned and under the direction of management.

### Salary and Benefits

Salary depends upon experience. AnewAmerica offers both Health and Dental insurance benefits to full-time employees after 90 days of employment.

### TO APPLY

Please read the full job description, and apply by sending a signed cover letter, resume, and references to [jobs2@anewamerica.org](mailto:jobs2@anewamerica.org). Please use "Client Manager, Oakland." in the subject line. Applications will be accepted until position is filled.

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