



## **Job Title: Client Service Specialist**

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Housing Options & Planning Enterprises, Inc. (H.O.P.E.) is a nonprofit corporation founded in 2005. Our mission is dedicated to assisting low-income individuals and families to achieve long-term financial and social self-sufficiency. Our programs are designed to be delivered in an integrated manner to give those that we support the maximum ability to obtain the necessary financial skills, means and opportunities to succeed.

**Job Description Summary:** This is a wide-ranging, fast-paced position, which includes on-the-job training as it relates to a great deal of customer service etiquette, high-call volume, inbound/outbound calling, and completing reports. Hours: 9:00am to 5:30pm

**Reports to:** Housing Director

### **Primary Job Duties:**

1. Perform initial client screening for agency services via telephone and input into client management system (CMS).
2. Send client intake packets via email or mail and record when sent as well as follow-up that packet has been received by client.
3. Follow-up (telephone and email) with clients regarding returning packet and answering questions regarding intake packet.
4. Able to work in a confidential environment and maintain client confidentiality.
5. Schedule client appointments with counselor once complete packets received.
6. Assist counselors in faxing documents (servicer authorization forms, etc.).
7. Become familiar with all H.O.P.E. services and assist with outreach efforts.
8. Participate in outreach by attending community events, coalition meetings, and presentations (some of which will be during the evening or weekends)
9. Compile reports as needed and requested.
10. Back-up to front desk person answering phones.
11. Perform administrative and other special projects as required.

### **Desirable Qualifications:**

1. Be detailed and proficient in computer technology and online client management systems and Microsoft Office (Word, Excel, etc.)
2. Highly organized, quick learner, strong negotiation skills
3. Strong communication and time-management skills as well as excellent listening skills.
4. Superior multi-tasking skills and ability to work well under pressure.
5. Excellent spelling and grammar skills



6. Excellent problem analysis and problem-solving skills
7. Able to track data and complete reports
8. Self-motivated, self-disciplined, ability to work independently and as a team.
9. Typing speed 40 word-per minute (WPM) (desired)

*The above statements are intended to describe the general nature and level of work being performed by the individual(s) assigned to this position. They are not intended to be an exhaustive list of duties, responsibilities, and skills required. Management reserves the right to modify, add, or remove duties and to assign other duties, as necessary. In addition, reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions of this position.*

*H.O.P.E. is an Equal Opportunity Employer and does not discriminate because of age, race, gender, religion, national origin, marital status, sexual orientation, gender identity, or disability.*