



## **BUSINESS COACHING PROGRAM SPECIALIST**

*Full-Time position based out of the Mountain BizWorks Asheville office*

### **BACKGROUND**

Mountain BizWorks ([mountainbizworks.org](http://mountainbizworks.org)) is a non-profit certified community development financial institution (CDFI) that provides tailored small business lending and peer learning services across Western North Carolina. We do this towards a mission of building a vibrant and inclusive local economy. Over the past few years, we have experienced strong growth and are looking for a dynamic individual to join our team to help meet the growing need for capital and entrepreneurial training in underserved communities. This position will be based out of Mountain BizWorks' Asheville office.

### **PURPOSE**

The overarching goal of the Business Coaching Specialist position is to maximize the Business Coaching program's effectiveness in supporting borrowers and prospective borrowers from initial loan readiness through post-loan ongoing business success.

### **KEY RESPONSIBILITIES**

- Maintain a robust understanding of the needs and challenges of entrepreneurs at different stages of business and sectors in order to create tailored learning solutions
  - Conduct intake assessments and capture a comprehensive profile of the client's background, skills, business development stage, market opportunities, and goals
  - Create individualized learning plans and connect clients to support services laid out in the plan, including but not limited to coaching, classes, and direct business services
  - Proactively make referrals to the Lending Department when clients demonstrate a relevant financing need and an appropriate level of loan readiness
- Make effective client-coaching pairings by maintaining a deep familiarity of the Business Coaching team members' unique backgrounds, skills, and coaching styles
  - Provide continuous follow up with coaches and clients to evaluate progress of coaching projects and client satisfaction
- Foster a high level of utilization of the business coaching program by active loan clients and communicating the benefits of coaching to prospective clients
- Work closely with lenders to create targeted learning plans to support existing and prospective borrowers in addressing specific loan readiness gaps
  - Maintain regular communication with client's lender, sharing information on client needs, status updates on coaching projects and potential issues as they arise
  - Proactively monitor progress of coaching clients in the lending pipeline and facilitate loan-readiness by connecting clients to resources
  - Coordinate with lenders to refine and add to clients' learning plans
- Contribute to the strategic direction of the Business Coaching program by discovering and implementing strategies that will maximize the program's effectiveness in getting loan-ready clients across the finish line and sustaining their success post-loan

- Identify skills gaps in the Business Coaching portfolio and assist in the recruitment, onboarding and training of new, highly qualified Business Coaches
- Contribute to the efficiency of the Business Coaching Program's systems and processes by developing automation and streamlining solutions
- Provide administrative and communications support to ensure an excellent customer experience for all assigned coaching clients
  - Oversee the coaching lifecycle from processing applications, setting project goals and objectives, coach pairing, monitoring, communications, payments and scholarship processing, project close-out, and related functions
  - Convert intake assessment reports into client service plans including setting up coaching projects, classes, loan inquiries or other services as appropriate
  - Enter and maintain accurate and up-to-date client records in CRM for scholarships documents, contact & account information, as well as coaching project activities
  - Other coaching program operations and administrative duties as assigned
- Maintain excellent relationships with the 50+ members of our Business Coaching team
  - Be responsive to coach questions, concerns, and requests
  - Assist with monthly invoicing to ensure accurate, and timely payment of coaches
- Help ensure consistent communications, assessment tools, processes, and systems are used across across both Learning and Lending departments
- Maintain a monitoring dashboard and provide a monthly report covering borrower coaching utilization and related accomplishments, metrics, and recommendations

#### **Additional Responsibilities:**

- Assist in the marketing of the Business Coaching program
- Share client success stories with the Communications team
- Be an active and supporting member of the Learning team
- Collaborate with team members and across departments to advance team and organizational goals and strategy

#### **QUALIFICATIONS**

- Commitment to Mountain BizWorks' Vision, Mission, and Values
- Experience and familiarity with small business development and entrepreneurship, ideally having experience in starting and/or running a local small business
- 4+ years working experience within a similar position of understanding the challenges and needs of small business owners throughout the business lifecycle
- Demonstrated proficiency in being able to quickly assess small business (and small business owner) needs and opportunities, and develop and communicate effective guidance
- Comfort with small business financial statements and projections
- Ability to prioritize the urgency of competing requests and take charge to meet deadline
- Timely follow-through and excellent organizational skills
- Excellent communication and customer services skills, both verbally and written
- Self-driven initiative and performance of the highest quality, with keen attention to detail
- Strong technological proficiency preferably including Google Suite, CRM databases (e.g. Salesforce), Microsoft Word and Excel
- Business coaching, training, or other adult education experience is a plus
- Experience in and commitment to working in a team-oriented environment
- Commitment to economic development, social justice & serving disenfranchised individuals

- Spanish written/spoken capabilities is a strong plus
- 4-year college degree or its equivalent

**Office Location:** Asheville (Temporarily Remote)

**Reporting Relationship:** Reports to Entrepreneurship Program Manager

**Classification:** Full Time Employee (37.5 hours/week), FLSA Exempt

### **Compensation & Benefits**

Mountain BizWorks provides a competitive salary. Full-time positions are eligible for a benefits package, including: medical insurance; retirement plan; paid vacation and holidays. Significant opportunities for growth.

Mountain BizWorks values and respects all types of diversity and strongly encourages applicants from traditionally marginalized groups to apply. We prohibit discrimination and harassment and provide equal employment opportunity without regard to, and not limited to, ethnicity, religion, race, national origin, abilities, gender identity, sexual orientation, age or genetic information.

### **To Apply**

Qualified/interested candidates should email their resume and cover letter to [careers@mountainbizworks.org](mailto:careers@mountainbizworks.org) with the subject line "Business Coaching Specialist position". Initial applications are requested by September 17. The position will remain open until filled thereafter.