

Capital Ready Solutions

An SSBCI Program of Great Lakes Women's Business Council / CEED Lending

Job Title: Capital Readiness Coordinator

Reports to: Director of Business Education

Job Overview:

We are seeking a highly motivated and strategic individual to join our team as a Capital Readiness Coordinator. In this role, you will play a pivotal part in guiding entrepreneurs through the process of getting loan ready. Your primary responsibilities will include providing individual 1:1 counseling to small business owners in the areas of finance and accounting, assisting clients in preparing loan application documents, and facilitating partnerships with external service providers to ensure clients are well-positioned to access capital.

Responsibilities:

1. Loan Readiness Counseling:

- Conduct personalized, 1:1 counseling sessions with small business owners to assess their financial health and readiness for accessing capital.
- Preparation of financial statements and projections.
- Provide guidance on navigating the loan application process, addressing questions, and offering tailored advice.

2. Loan Application Document Preparation:

- Guide clients in preparing necessary loan application documents.
- Ensure that clients have a comprehensive and accurate set of documents for loan applications.
- Packaging and presentation of the loan proposal

3. Communication with Great Lakes WBC / CEED Lending:

- Attend CEED Lending team meetings at least twice a month.
- Check in with program leadership.

4. Data Management and Reporting:

- Maintain accurate records of counseling sessions, client progress, and outcomes.
- Generate regular reports on individual client performance and program effectiveness.

5. Metric Tracking:

- Track key metrics such as client progress, completion of scopes of work, and overall program effectiveness.

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6. Outcome Reporting:

- Generate reports on individual client outcomes, successes, and challenges.
- Provide insights for future program development.

Skills and Qualifications:

- Interpersonal Skills
- Small Business Experience
- Project Management Experience
- Cash Flow Analysis
- Finance/ Accounting: Debt & Equity Finance
- Oral/Written Communications
- Strong analytical skills
- Sales and Marketing
- Procurement
- Economic Development

Qualifications:

1. Bachelor's degree in business administration, finance, or accounting.
2. Proven experience in lending, preferably in the financial or small business sector.
3. Strong project management skills, with the ability to oversee multiple tasks and deadlines.
4. Excellent communication and interpersonal skills to effectively engage with stakeholders and build partnerships.
5. Knowledge of small business financing, technical assistance programs, and government funding mechanisms.
6. Detail-oriented with a focus on data accuracy and compliance.
7. Proficient in using Microsoft Office Suite and other relevant software.
8. Ability to travel as needed for program-related activities.

Application Process:

Submit resume to Kelly Hill khill@greatlakeswbc.org. No phone calls will be accepted regarding this job posting. For additional information please reference the website, www.greatlakeswbc.org