



Customer Service Representative (CSR)

404 Euclid Avenue, Ste. 271

San Diego, CA 92114

www.accionsandiego.org

(619) 795-7250

About Accion San Diego

The mission of Accion San Diego as a non-profit organization is to create economic opportunity for primarily low-to-moderate income start-up and existing entrepreneurs who lack access to traditional credit. Through business loans ranging from \$300 to \$50,000 and support services, Accion San Diego strengthens the roots of emerging entrepreneurs and helps them to thrive in their communities, creating social and economic change. Visit www.accionsandiego.org for more information.

Job Overview: The CSR's main objective is to support the lending department and process loan applications in the pipeline, ensuring accuracy, efficiency and the highest level of customer service to potential clients. The CSR serves as part of a client management team in servicing potential and existing clients. The CSR will assist in processing the application from beginning to end and will follow up with potential clients who may need additional assistance compiling documents or answering questions about the loan application process with Accion

Current CSR responsibilities:

1. Answer phone calls/walk-ins of potential clients
2. Provide program information to inquiries and answer any questions
3. Follow up with inquiries, track all incoming referrals and provide reports on leads
4. Facilitate intake of all loan applications and serve as the lead for any potential client ready to apply for a loan
5. Assist clients with preparation of loan application and required documentation
6. Assist clients with referrals to outside support sources when they do not meet initial screening criteria, or work with LSS to respond to client needs
7. Provide follow-up calls to pending files and leads
8. Prepare loan packet complete with all required documents for underwriting by Loan Officer
9. Run client credit reports
10. Input client information into TEA software database
11. Initiate reminder calls and serve as first point of contact for BDO to send loan-ready clients to apply
12. Assist in Accion U.S. Network quarterly reporting
13. Assist with internal/external quarterly inquiry reporting
14. Assist in identifying communication strategies with past inquiries and work with Marketing Manager to send follow-up communication
15. Support lending staff & executive management team members with daily tasks or special projects

Qualifications:

1. Bilingual (English/Spanish).



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2. Excellent communication skills, written and oral.
3. Financial and quantitative skills, computer literate.
4. Strong organizational and time management abilities.
5. High level of initiative and motivation.
6. Team player with customer service experience
7. Ability to work independently and manage multiple tasks simultaneously.
8. Bachelors or Associates degree, OR, related experience required

Physical Demands:

While performing the duties of this job, the employee regularly is required to sit; use hands to finger, handle, or feel; and talk or hear. The employee occasionally is required to stand; walk; and reach with hands and arms.

Work Environment:

Work is generally performed in an office setting with a moderate noise level. The Accion team is a passionate and professional group that loves supporting local small businesses to make their dreams and economic stability grow!