



## **Assistant Manager, Sales Support (Full-Time, Non-Exempt)**

### **The Organization**

Opportunity Fund is a different kind of financial institution – a Community Development Financial Institution (CDFI). Over 20 years ago, the US Treasury Department created this designation for loan funds (like Opportunity Fund), credit unions, and others who are committed to using financial tools to help low-income communities.

We provide loans to low- and moderate-income immigrants, women, and other deserving, but underserved small business owners. We have seen firsthand the ripple effect of such loans. Businesses grow, jobs are added, healthier communities and families thrive.

Our mission is to drive economic mobility by delivering affordable capital and responsible financial solutions to determined entrepreneurs and communities.

We continue to drive economic mobility, fostering entrepreneurship, hard work, and ideas. We envision an inclusive world in which all entrepreneurs and communities have the opportunity to make their dreams come true.

In 2020, Opportunity Fund joined forces with Accion U.S. Network to create Accion Opportunity Fund to together provide national, scalable programs that leverage technology and data analytics with high-touch customer service to drive deep community impact. Together, we are building a diverse, vibrant community where opportunity, knowledge, and access to capital are within reach.

For more information about us, visit <https://www.opportunityfund.org/about/>.

### **The Role**

- Manage team members across different geographies – driving improved productivity, efficiency, and quality
- Document processes, existing and new, to ensure all applications are processed efficiently and accurately
- Receive and resolve customer questions, including but not limited to calls and emails from AOF staff, brokers, partners
- Create polished training materials on all process updates
- Assist Sr. Director in managing projects identified to improve team performance
- Lead productive meetings
- Pull and analyze reports across teams to assess performance
- Manage relationship with pre-underwriting, underwriting, loan funding and sales departments – capturing their feedback and priorities, structuring a joint approach for process improvements
- Problem solve with IT and other departments to resolve issues faced by the team
- Perform other duties assigned by supervisor

## **The Person**

Highly qualified candidates will share Accion Opportunity Fund's commitment to its mission and will embody the organization's core values bringing a broad range of skills and experience including, but not limited to:

- High School Diploma or GED
- 2-4 years of experience in financial related customer service, auditing/pre-UW experience preferred
- Proficiency using Microsoft Word, Excel and Outlook
- Able to problem solve and ensure resolution to issues faced by team or customers
- Able to multi-task and communicate effectively with the Small Business team
- Analytical skills and able to work with numbers
- Mature minded with a high level of confidentiality
- Ability to work from Opportunity Fund's San Jose, CA or City of Commerce, CA office as needed
- During COVID-19 this position is primarily remote/work from home.
- Post COVID-19 this position may require more frequent in office attendance including up to full-time.

### **Preferred Qualifications**

- Spanish fluency preferred

## **Perks & Benefits**

Our mission is what motivates us to come to work each day. We know that happy employees are productive employees, which is why we offer a comprehensive benefits package that includes:

- Competitive salary commensurate with experience.
- An environment that values work-life balance.
- 100% company-funded Medical, Dental, Vision, Life & Disability coverage for employees. 90% company-funded dependent coverage.
- Tax deferred & Roth 403(B) Retirement Plan with employer match. Employer match increases with tenure.
- Paid vacation (increased with tenure), 13 paid holidays, sick, and family leave days.

### **To Apply:**

Interested candidates should click [here](#) to apply to the job online.

*Diverse candidates are encouraged to apply, especially BIPOC.*

*Opportunity Fund is an Equal Opportunity Employer. [www.opportunityfund.org](http://www.opportunityfund.org)*