ABOUT THE POSITION
Prepare + Prosper (P+P) works hand in hand with Sunrise Banks, N.A., Member FDIC, to offer the FAIR products (checking, savings credit builder). These products work together to offer more control with less fees for low- to moderate-income people. FAIR meets people where they are at with a goal of financial inclusion for all.

The Navigator provides customer engagement from the point of first inquiry to enrollment support using the HubSpot CRM and other technology tools. The Navigator will assist prospective customers to assess the most suitable banking products to meet their specific needs and banking preparedness. This position will navigate customers through the enrollment process until they have successfully opened their account.

POSITION AT A GLANCE
- Our preferred candidates come with a minimum of 2 years of experience in a related customer service environment or a combination of relevant education and experience.
- This position works a hybrid model with some evening and weekend hours. The schedule will accommodate a range of needs with the potential for flexibility.
- This is a non-exempt part-time, seasonal position averaging 10 – 20 hours per week in July through September and January through April.
- The office is located near University Ave and Hwy 280 in St. Paul with free parking and public transit options available.

WHAT YOU WILL DO
- Provide excellent and responsive customer service by phone, email, text, and in-person as relevant to banking enrollment. Listen actively and anticipate customer needs when possible.
- Approach customers in a person-centered manner.
- Provide information in a way to be readily understood and accessible to customers.
- Provide coverage for FAIR enrollments at 1:1, pop-up, tabling events, and group enrollment events. Enrollments happen virtually and in-person.
- Serve as the customer advocate in communicating with the FAIR team to include troubleshooting enrollment issues and representing customer needs and feedback.
- Pull and review customer’s credit and bank history reports to help determine the best path forward in enrolling in the FAIR account(s) or find other appropriate resources.
- Educate and coach customers on the use of required technology tools.

WORK ENVIRONMENT
- This position has the option to work hybrid for a portion of the work week with supervisor approval.
- Some work will be performed in an office environment that is accessible. Other work at off-site locations is required and those may not necessarily be fully accessible.
- This role routinely uses standard office equipment such as computers, phones, photocopiers, and scanners.
This position requires the ability to lift and/or move objects up to 25 pounds.

While performing the duties of this job, the employee is regularly required to talk and hear. The employee needs to move about inside the office and outside at community events and reach with hands and arms.

Occasional travel between the main office and remote Twin Cities locations is required. Must have access to reliable transportation options.

Some evening and weekend hours are required.

**HOW WILL YOU KNOW IF YOU ARE A GOOD FIT?**

- Minimum of 2 years of experience in a related customer service environment or commensurate combination of relevant education and experience.
- Ability to quickly build rapport with and sensitivity to issues and concerns of BIPOC communities and other marginalized groups.
- Experience with and strong commitment to providing quality customer service.
- Above average verbal and written communication skills -- including public settings, relationship building, and community outreach.
- Ability to communicate and respond in a timely manner.
- Good attention to detail management and delivery of quality work.
- Demonstrated ability to work with some autonomy.
- Experience with or demonstrated ability to learn new technologies like computer relationship management (CRM) software and databases (position will use MS Outlook, Word, Excel and HubSpot).
- Strong in collaborative work; interested in problem solving; driven to improve the experiences of customers and those financially marginalized.

**WHY YOU’LL LOVE P+P**

- Paid sick and safe time (SST), accrued at 1 hour of SST for every 30 hours worked.
- Mileage reimbursed for work-related travel.
- Flexible work schedule.

**WHO WE ARE**

P+P is a nonprofit that works with people to build financial well-being and address financial inclusion. Harnessing the power of volunteers and partnerships, we provide free tax preparation and financial services, products, and coaching, and work to change systems to create economic opportunity for everyone. We are committed to the principles of diversity, equity, and inclusion in our work and are particularly interested in receiving applications from people of color and those with lived experiences similar to the people who use our programs. Learn more about P+P at prepareandprosper.org.

**HOW TO APPLY**

Please submit resume and cover letter to jobs@prepareandprosper.org with the subject line “FAIR Banking Navigator.” Indicate in your email where you heard of the position opening. Position will be open until filled but hiring committee will begin reviewing resumes on 07/14/2023. The anticipated start date is early August 2023.

**OUR COMMITMENT TO EQUAL EMPLOYMENT OPPORTUNITY**

P+P continues to work towards a more inclusive workspace, and as such, we are an equal opportunity employer and do not discriminate against any employee or applicant for employment because of race, skin color, ethnicity, religion, gender, sexual orientation, national origin, disability, age, marital status, military status, pregnancy, or parenthood.