

## JOB DISCRIPTION REGIONAL BUSINESS LIAISON

### Overview

Reporting to the General Manager, the Business Liaison will provide additional community based resources to support small and medium (S&M) enterprises in accessing support programs made available in response to the Covid-19 pandemic and assist those businesses who require mitigation, recovery and transitioning.

### Key Functions & Duties

#### Coaching

- Assist Business Analyst (BA) to develop questionnaire for client interview to determine their current situation.
- Initiate contact with client/business who have been impacted by COVID19. Be able to explain the program(s) criteria.
- Respond to initial enquiries regarding program options, specific financing requirements, funding options, and general information pertaining to Community Futures' services.
- Identify immediate and future needs of the client.
- Identify the clients' readiness to proceed with a program option and arrange meetings. (in person social distancing and or zoom / phone).
- Supply the client with all current support contacts available.
- Where required, assist in completing on-line or manual form applications that apply.
- Where applicable and when appropriate, group sessions can be planned to provide guidance and information on government programs and other financing options, mitigation transitioning into recovery.
- Advise on various small business management issues, including sales, marketing, financing, financial management, bookkeeping, human resources management, e-business, legal considerations, exporting, inventory management, and taxation and source deductions.
- Understand how business opportunities fit into the community/industry/region and the feasibility of the opportunities' success given the external environment.
- Provide aftercare and growth support and ensure appropriate and effective referrals.
- Communicate the commercial lending process to S&M business clients.
- Refer clients to workshops and training options for S&M businesses.

#### Business Growth

- Understand how business opportunities fit into the community/industry/region and the feasibility of the opportunities given the external environment.
- Identify existing growth-oriented businesses that could help grow our local economy with assistance from our Community Futures organization.

**Loan Analysis and Management - Assist Business Analyst with the following**

- Support clients in the preparation of loan applications and any supporting materials – business plan, marketing plan, financial forecasts, etc.
- Review and analyze applications for financing, including assessing financial viability, management capability, social and community impact, repayment ability, job creation, feasibility and security.
- Perform due diligence checks in the preparation of proposals, including:
  - Credit checks
  - Personal Property Security Act (PPSA) searches
  - Title searches
  - Historical financial statement analysis
  - Revenue Canada, GST, WCB, personal income tax
  - Other third party verifications
- Make loan recommendations taking into account Community Futures goals and risk management.  
Prepare letters of offer and other loan security documents Research and prepare requests for loan modifications or alterations for approval by General Manager and/or appropriate committee.

**Administration**

- Maintain accurate records including copies of completed questionnaires and tracking notes on each client.
- Forward statistical information to the Program Coordinator for analysis and documentation.
- Enter client information and statistics into client management system.
- Prepare and submit reporting requirements.  
Attend and participate in staff other appropriate meetings.

**Requirements of an Ideal Candidate**

- Degree in Commerce / Business or relevant field and or experience.
- Preferred entrepreneurial experience.
- Strong analytical skills including financial statement and ratio analysis.
- Ability to coach clients and provide business advice with sound business acumen.
- Excellent written and oral communications skills including the ability to effectively deliver oral presentations.
- Superior interpersonal skills including the ability to build strong relationships; have good listening and interviewing skills; effective conflict management skills; impeccable judgment, ethics and morals.
- Strong customer service skills including empathy, a sense of urgency and commitment to cooperation.
- Ability to work comfortably with a variety of people regardless of socio-economic status, educational levels, race, gender, religion, disability/ability.
- Treat information in a confidential manner and understand the Personal Privacy Act.

- Proficient computer skills including ability to learn reporting software programs.
- Excellent organizational skills including the abilities to manage time, multitask and prioritize.
- Highly motivated and adaptable.
- Ability to represent the organization in a positive manner.
- Ability to learn and have an understanding of relevant legislation and policies.
- Strong local & regional business knowledge and contacts are an asset.
- Knowledge of Community Futures.
- Ability to travel within the Nadina region.
- Valid driver's license and access to a vehicle while at work.