

## Vice President of Client Services

### Summary:

The Vice President of Client Services leads the WESST statewide regional offices and associated programs towards the collective effort of delivering experiential and impactful consulting, training, and access to capital for WESST clients. This includes effectively leading their team members and enabling their success. The role is also focused on evaluating programs and services to ensure that through data analysis, what WESST is delivering is generating value and creating measurable impact for clients, team members and those who invest in WESST.

### Key Accountabilities:

#### *Leadership*

Accountable for one's self-awareness regarding a service-oriented growth mindset; motivating and enabling the success of others, active listening, collaborative problem solving, continuous learning, practicing empathy and gratitude, and showing up with integrity.

#### *Statewide Region Operations and Program Management*

Accountable for the Regional Managers and Program Managers development and delivery of all programmatic initiatives (including WBC, grant-funded programs, incubation and future programs as may be developed) to ensure that these programs are meeting established qualitative and quantitative goals on an annual basis.

#### *Training Program Management*

Accountable for establishing, deploying and supporting trainers in the delivery of a best practice methodology for statewide training programs to ensure that all trainings and workshops (delivered by internal/external trainers) are meeting established qualitative & quantitative goals on an annual basis.

#### *Consulting Program Management*

Accountable for establishing, deploying, and supporting consultants in the delivery of a best practice methodology to ensure that consulting services (including one-on-one, mentorship, advisory, by internal & external providers) are meeting established qualitative & quantitative goals on an annual basis.

#### *Access to Capital Collaboration*

Partner with the WESST Loan Team in collaboration with statewide regional team members as we work together to provide experiential and impactful financial assistance for clients. This includes the preparation of loan packages for the Loan Fund Committee and/or other lenders to support business growth.

## Job Duties and Responsibilities:

### *Leadership*

- Motivate and enable the success of others. Be inclusive, share information, celebrate successes, and develop your team members' skills for the next level of leadership.
- Listen actively. A communication skill that involves seeking to understand the meaning and intent of the person speaking.
- Be curious, challenge your own biases and demonstrate humble inquiry.
- Collaborative problem solving. Seek feedback from others to collectively determine the best go-forward strategy.
- Create a psychologically safe work environment where team members know it's OK to take risks, to express their ideas and concerns, to speak up with questions, and to admit mistakes — all without fear of negative consequences.
- Foster a spirit of teamwork and unity among team members that allows for disagreement over ideas, conflict and expeditious conflict resolution, and the appreciation of diversity as well as cohesiveness, supportiveness, and working effectively together to enable each employee and the region/program to succeed.
- Lead employees to meet the organization's expectations for productivity, quality, and goal accomplishment. Build capability among team members to enable a high level of productivity and self-sufficiency.
- Consciously create a workplace culture that is consistent with that of the overall organization that emphasizes the identified mission, vision, guiding principles, and values of the organization.

### *Statewide Region Operations and Program Management*

- Recruit, integrate, evaluate, develop, and as necessary terminate internal and external directly aligned resources.
- Coach, mentor and develop Regional and Program Managers, including overseeing new employee onboarding and providing career development planning and opportunities.
- Empower employees to take responsibility for their jobs and goals. Delegate responsibility and expect accountability and regular feedback.
- Lead employees using a performance management and development process that provides an overall context and framework to encourage employee contribution and includes goal setting, feedback, and performance development planning.
- Provide effective performance feedback through employee recognition, rewards, and disciplinary action, with the assistance of HR consultant, when necessary.
- Maintain employee work schedules including assignments, job rotation, training, vacations and paid time off, and telecommuting.
- Maintain transparent communication. Appropriately communicate organization information through department meetings, one-on-one meetings, and appropriate email, and regular interpersonal communication (travel required).

- Create a portfolio management process for all WESST programs including: WBC, Incubation, Money Learning Lab, Spanish-language programming and other new initiatives as they develop. Work with Program Managers to establish the best methodology for designing, developing and evaluating program impacts.
- Manage each program life cycle (design, integration, utilization, evaluation, and termination).
- Participate in grant writing and submissions, with emphasis on program development, training and resource alignment.
- Create a process and train all regions/programs on how to transition grant proposals from conception to deployment and management.
- Effectively position yourself in the community to foster relationships and draw awareness to WESST's programs and initiatives.
- Proactively identify opportunities that seize on the need for collaboration with other national, state, or local programs; and/or designing and integrating new programs.
- Review and evaluate metrics and program data for desired impact to ensure WESST is delivering the best programming, and proactively understand when to adjust focus and direction.
- Review all required funding reports including but not limited to: OWBO narratives, financial reports, foundation reports, and other funder reports as required.

### ***Training Program Management***

- Manage the training program statewide to provide clear accountability measures for all trainers.
- Develop clear and actionable instructional design standards for all WESST-owned curricula. Ensure all regions/programs are delivering training according to these standards.
- Maintain a strong understanding of the direction and trends for delivering training and workshops to aspiring and existing entrepreneurs.
- Lead and/or partner with staff to develop valuable and measurable trainings/workshops that adhere to established WESST instructional design standards.
- Develop and oversee a well-organized evaluation program.
- Recruit and on-board internal and external training resources to maintain consistency on what is needed and why and how WESST delivers training content and sessions.
- Develop and execute a process that allows continuous improvement of trainings/workshops using the analysis of existing data, client and staff surveys.
- Build training staff capacity through professional development trainings and initiatives.

### ***Consulting Program Management***

- Maintain a strong understanding of the direction and trends for the delivery of value added consulting services.
- Effectively position yourself in the regional communities to foster relationships and draw awareness to WESST's collaborative consulting opportunities.
- Establish and maintain a standardized fee structure across the organization.

- Design and oversee a robust process for vetting outside providers in order to expand the breadth of expertise.
- Research and implement a methodology to utilize in-kind funding and/or matching donations to enhance WESST consulting services.
- Develop and execute an onboarding process for internal/external consultants to ensure the high quality delivery and consistency of WESST consulting services.
- Develop and execute a process that allows continuous improvement of consulting services using the analysis of existing data, client and staff surveys.
- Build consulting staff capacity through professional development trainings and initiatives.

#### *Access to Capital Collaboration*

- Partner with the WESST Loan Team in collaboration with statewide regional team members.
- Work together to provide experiential and impactful financial assistance for clients.
- Coach and guide regional team in the preparation of loan packages for the Loan Fund Committee and/or other lenders to support business growth.

#### **Behaviors and Competencies:**

Specific behaviors and competencies that are essential to success for this position include but are not limited to:

- Positive attitude.
- Relationship oriented.
- Ability to influence.
- Flexible.
- High tolerance of ambiguity.
- Passionate about the company and the services that WESST provides.
- Instructional Design capability.
- Project Management capability.
- Desire and experience supervising people and programs.
- Small business owner/entrepreneurial insight.
- Analytical, organizational, verbal, and written communication skills.
- Holistic systems thinker.
- Process oriented.
- Attention to detail; organized.
- Analytical thinker.
- Culturally unbiased and open-minded.
- Problem solver.
- Creative thinker.

## Company Values

Specific company values that represent the culture and/or environment at WESST.

- **Innovation.** We value above all our ability to serve our clients by constantly adapting program services so that client needs are effectively met in a constantly changing marketplace.
- **Integrity.** We are committed to the highest standards of ethics, honesty, and mutual respect in our internal and external relationships.
- **Quality and Excellence.** We strive for superior performance in our communications, standards, processes, leadership, planning, programming and execution.
- **Accountability.** We are committed to doing what we say we will do so that our various stakeholders are confident that WESST is a trustworthy organization making economic impact in New Mexico.
- **Equity, Diversity and Inclusion.** WESST is committed to promoting equity, diversity, and inclusion practices internally among our Board and staff and externally among our clients, supporters, and community partners.

## Acknowledgement

I acknowledge receiving a copy of my position expectations and I understand these duties and responsibilities. I will be accountable for the job I am assigned. I further understand that it is my responsibility to contact my manager if I have questions or require clarification of these duties.

Signed \_\_\_\_\_

Date \_\_\_\_\_

Print Name \_\_\_\_\_