**Client Success Manager**

**ROLE MISSION**

As a Client Success Manager, you will be partnering with our clients to ensure their progression and engagement in our New Life Program from start to finish. This role owns the effective goal setting, relationship building, coaching and accountability of the clients in their care. You are serving as a liaison for the entire Raleigh Rescue Mission team to ensure the most appropriate services are provided to a client, which should result in meaningful transformation in their life and ultimately, long-term stability.

**OUTCOMES**

Connect and Plan

* Complete the initial assessment conversations to understand client situation and perform initial goal setting
* Lead onboarding process, build initial client relationship, as well as drive follow-ups for assigned engagement in various programs (vocational training, parenting, counseling, substance recovery, etc.)
* Personalize an overall client progression plan with target dates and finalize a weekly schedule with recommendations that meet the client’s unique challenges and goals
* Connect clients to external resources to aid in achieving their goals
* Check-in briefly with all assigned clients daily
* Document all information regarding client progress in Mission Tracker

Educate and Coach Clients

* Lead regular client one-on-ones, debriefs, and coaching to advise on goal setting strategies, progress, and growth opportunities
* Expertly facilitate group sessions around a variety of skills and growth areas for clients (career, emotions, life skills, devotions, etc.)
* Be responsible for client outcomes and progress through the New Life Plan

Adapt and Ensure Progress

* Meet (at least) weekly with the client to adapt and create weekly SMART goals related to the client’s unique stage in the NLP, to ensure overall progression through the program
* Iterate on weekly schedule and overall client target dates
* Incorporate feedback from the entire team (vocational training, children’s development, training classes, etc.) to consistently improve client growth, providing appropriate accountability when necessary
* Willingly step in to assist in any area of the Mission as needed

**COMPETENCIES**

* Interview and converse with clients to obtain pertinent information
* Guide clients through goal setting processes and implementation
* You have a strong desire to encourage and engage a wide-variety of clients with a Christ-centered approach
* You recognize and plan for potential obstacles within your group of clients
* You independently execute on priorities with minimal supervision, proactively identifying and solving client issues
* You offer situational leadership within cross-team discussions, while ensuring teammates and fellow employees always feel a sense of belonging and support
* Expertly document and navigate the client database system (Mission Tracker)
* You are able to create clear client plans, with direct deliverables and clear handoffs
* You are able to independently manage sources of tension common to a social services environment, while escalating as appropriate
* You are vocal and collaborative, generous in offering your experience and ideas to help shape client and team growth

**DESIRED EXPERIENCE**

* 5+ years of experience in Case Management, training, coaching, or consulting a variety of clients
* 3+ years of specialization in goal-setting, goal tracking, and holding others accountable.

**SAMPLE WEEK IN THE LIFE**

**Sunday/Monday**: Review client progress metrics and client communication emails to prepare for the week’s sessions. Facilitate 3 or 4, 1:1 client SMART Meetings/Coaching Sessions with clients. Communicate with clients on follow-ups. Update entire team on client outcomes and next steps. Connect, coach, and assist clients, as needed.

**Tuesday**: Have 1:1 with your manager, providing updates and goals for clients for the week. Connect, coach, and assist clients as needed.

**Wednesday**: Attend weekly team meeting and monthly all-team meeting. Lead client debriefs. Solicit feedback from women’s ministry team and engage new actions for client sessions.

**Thursday**: Facilitate 3 or 4, 1:1 client SMART Meetings/Coaching Sessions with clients. Communicate with clients on follow-ups. Update entire team on client outcomes and next steps. Connect, coach, and assist clients as needed.

Adapt and advise on goal practices for your best client (who values your partnership and is growing their skills independently).

**Friday/Saturday**: Facilitate 3 or 4, 1:1 client SMART Meetings/Coaching Sessions with clients. Complete your 15Five check-in. Wrap up deliverables and provide updates on your own personal goals. Manage calendar slots for next week’s meetings and priorities.

**SCHEDULE**

This is a full-time, salaried exempt position. The typical work week will be Monday through Friday, between the hours of 7:00 am and 7:00 pm (flexible), working an expected 40+ hours/week. Ability to accommodate early-morning or after-hours meetings at least 4 days a week is a must due to collaboration across various staff and client schedules.

~7am to 4pm

~9am to 6pm

**CLIENT OUTCOMES BY PHASE**

**Phase 1**

* Meet with new client during their 1st week to do longer assessment
* Determine if they are fit for the program
* Create initial plan and target date
* Class enrollment: Career Development, Parenting, Counseling, Substance
* Urgent medical, mental, dental assessments
* Driver license status and plan
* Criminal background review and mitigation, expunction if necessary

**Phase 2**

* Comprehensive employment history
* Medical, mental, dental assessments
* Driver license plan in action
* Review all classes and engagements (this needs to be part of all case management)

**Phase 3**

* Client vocational plan
* Employment search support
* Driver license plan in action; ideally client has obtained license
* Budget planned
* Obtain approved job

**Phase 4**

* Consistent employment
* Updated target exit date
* Obtain license
* Following budget; saving money - Move out budget formulated after employed 60 days
* Obtain car
* Credit repair

**Phase 5 (Supervisor is managing this)**

* Consistent employment
* Following budget; saving money
* Car maintenance
* Parenting support
* Updated target exit date and plan to move out within 12 months, update plan monthly
* Credit repair
* Apply to Habitat or another housing program
* Review Community and church involvement
* Review SA self-help group if applicable
* Review apartment maintenance needed