

Title Business Operations Specialist

Reports To: COO

Department: Operations

Role Purpose & Scope

The Business Operations Specialist plays a key role in supporting the day-to-day operations of LoanNEX by managing invoicing, coordinating with our PEO partner on HR and payroll matters, and executing marketing operations initiatives. This role serves as a critical link between internal teams and external partners, ensuring smooth administrative and operational workflows across the organization.

Role Responsibilities

Human Resources

- Liaison between our PEO firm and LoanNEX.
- Employee onboarding and offboarding
- Benefits administration support
- Leave of Absence administration
- Maintain employee handbook and policies
- Payroll support

Marketing

- Distribute newsletters and schedule email campaigns (content provided)
- Pull and organize distribution lists for targeted outreach
- Coordinate partner marketing intake requests and manage follow-ups
- Coordinate the creation of marketing materials, including flyers and presentations
- Edit and upload videos to YouTube in accordance with established guidelines
- Ensure all materials are accurate and consistent with branding standards
- Schedule emails and manage content distribution timelines
- Track project progress and ensure deadlines are met
- Maintain organized records of marketing assets and activities

Finance

- Execute and manage customer invoicing



Administration

- Manage equipment procurement and asset tracking
- Coordinate travel scheduling and logistics for executive management

Qualifications

Required

- Bachelor's degree in Business Administration, Marketing, Communications, or a related field (or equivalent work experience)
- 2+ years of experience in an operations, administrative, or marketing coordinator role
- Experience with invoicing or basic accounting workflows (QuickBooks, NetSuite, or similar)
- Demonstrated ability to handle confidential information with discretion

Preferred

- Experience working with a PEO firm (e.g., Resourcing Edge, Insperity, ADP TotalSource)
- Exposure to a SaaS or fintech environment
- Experience supporting HR functions such as onboarding, benefits, or leave administration

Skills & Competencies

- Detailed oriented
- Highly organized
- Knowledge of Salesforce and ClickUp
- Proficiency in Microsoft 365 (Word, Excel, Outlook, Teams)
- Familiarity with email marketing platforms (HubSpot, Pardot, or similar)
- Comfortable wearing multiple hats in a fast-paced fintech environment

LoanNEX is an equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, creed, sex, national origin, age, disability, marital status, sexual orientation, gender identity, veteran status, or any other protected status in accordance with applicable federal, state, and local laws. Applicants must be able to work without employer sponsorship. LoanNEX is committed to providing reasonable accommodations for qualified individuals with disabilities.