

POSITION DESCRIPTION

Position Title:	Senior Client Manager
Reports to:	Director
Works with:	Accountant and Client Service Coordinators
Employment Status:	Full time with work from home one day
Purpose:	The role of Senior Client Manager in our Firm is a key role in achieving the Firm's Purpose: To make our client's financial lives easier through smart advice, clarity and confidence so they can focus on what matters most. The primary responsibilities include: - Initially managing a client base of approximately \$900,000 in business client fees, with a goal to manage between \$1.3-\$1.5m - Manage, mentor & train team members in your silo - Build lasting relationships with clients - Acting as a proactive, trusted advisor — helping clients see their numbers clearly, plan ahead and make confident decisions, consistent with the Firm's Purpose to make our client's financial lives easier through smart advice, clarity and confidence – so they can focus on what matters most. - Producing or overseeing the production of financial statements and statutory returns, including for companies, trusts and partnerships. - Contribution to adding and managing new services to existing clients that will be for the client's betterment. - Providing new clients and existing clients advice with respect to bespoke business structuring solutions. - Contribution to meeting, onboarding and managing new clients into the Firm. - Contribution to Firm development and growth strategies - Contribution to introducing new clients to the Firm. - Managing team to produce time job outcomes. - Undertaking additional accounting and financial services as required to meet the Client's needs. Examples include preparation of cash flow budgets, finance applications and tax planning. - Efficient and productive collaboration with Client Services and Bookkeeping teams. - Where relevant, overseeing preparation and lodgement of QBCC Minimum Financial Requirement (MFR) reporting for licensed building and construction clients within your silo.
Key Performance Results areas	- Following the Firm's 'House Rules' and 'Values' - Ability to meet personal revenue / productivity budget. - Job scheduling and preparation of engagement Service Agreements priced in line with the firm's pricing schedules prior to commencement of jobs. - Contribution as part of the overall production process leading to the Firm meeting its revenue targets. - Delivery of financial statements, statutory documents and other documentation as required for client engagements within set turn-around times.

	▪ Entering of time, budgets, outlays and other key data within the Firm's client management system. ▪ Management of Work In Progress and lock-up days for silo work undertaken including and achieving agreed billing realisation rates. ▪ Contribute within the team and including mentoring where required to ensure the Firm delivers on a high level of ongoing client service. ▪ Contribution to office culture as measured through peer and management feedback. ▪ Formal performance review and informal feedback. ▪ Minimal number of times Principal requires rework to be undertaken. ▪ Effective management of tasks and delegated tasks. ▪ Demonstrated development of silo team members — evidenced by regular one-on-one reviews, completed training/CPD plans, and low avoidable staff turnover.
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Key areas of accountability	Tasks
Quality client advice	▪ Accurate input Client details into accounting, tax and other financial applications as required. ▪ Identify strategic opportunities and technical issues in our Clients' financial affairs ▪ Ensure all legislation and other technical information used by the Firm in providing advice is up to date and accurate. ▪ Contribute towards the betterment of Clients' financial position in conjunction with changes in Clients' circumstances, their business interests and prevailing business conditions.
Administrative Support	▪ Efficient and productive collaboration with Client Services and Bookkeeping teams. ▪ Ensure all client communications are maintained electronically within the Firm's client management system
Client Liaison	▪ To generally work autonomously in managing and liaising with Clients to manage the relationship, handle client work and deliver upon the role of Client Account Manager's overall Purpose and Key Performance Results ▪ Answer telephone calls and address queries (within limits of role) from Clients. You will be responsible for handling general queries and the preparation of appropriate file notes. ▪ Attend client meetings with the Principal/Manager as required/appropriate
Computer System	▪ Working familiarity with the applications required directly to complete Client assignments ▪ Working familiarity with the Firm's broader IT / App ecosystem including: XPM, FYI, XERO, IGNITION, MS OFFICE, ADOBE.
Marketing and business planning	▪ Participate in practice marketing and business plan meetings, as required
Compliance and education	▪ Maintain CPD hours. ▪ Collaborate in technical training as required to other team members as required ▪ Undertake appropriate activities to achieve/maintain education required by the relevant professional accounting body. ▪ Ensure all activities are carried out in compliance with relevant Acts, legal requirements and ethical standards.

	Gain necessary skills and understanding to manage and use the Firm's IT applications existing and introduced as required.
Teamwork	- Work effectively with team/work group or those outside the formal line of authority (e.g. peers, senior managers) to accomplish the Firm's goals. - Keep management and others informed appropriately and as required about work status. - Monitor and develop the skills of junior team members wherever possible. - Take actions that respect the needs and contributions of others. - Contribute to, accept and assist in the implementation of the Firm's vision, values and house rules.
Other Duties	- As and when required by a Principal or Manager, you may be required to undertake activities which fall under the scope of another role. Examples include, but are not limited to: - Follow up outstanding invoices for payment - Make presentations at seminars that the Firm conducts for its clients - Contribute to the Firm's marketing program including the writing of blogs and articles for publication on the Firm's website
Qualities and Skills	- Excellent oral and written communication skills - Extensive relevant experience in a client based role - Ability to generally manage the role autonomously - The ability to liaise with clients effectively, and offer solution based assistance where necessary, whilst ensuring client satisfaction - An aptitude for working with computers - Good knowledge of Word, Excel, accounting software, tax return preparation software - Well organised with an attention to detail - The ability to prioritise and handle a number of tasks simultaneously when required - Problem Solving and analytical skills - Interpersonal Skills - Training and Professional Development - Commercial and advisory mindset — able to spot practical opportunities for clients to improve profitability, manage cashflow and reduce risk, not just meet compliance deadlines. - Use and maintain systems and applications
Qualification and experience	Essential - Tertiary business degree - Understanding of accounting practice and culture - Several years demonstrated experience in a client-facing role within Australian public practice accounting. Desirable - Membership of a professional accounting body CPA or CA - Higher level business qualifications e.g. MBA - QBCC experience
Policies and Procedures	- It is an essential element of your role that you comply with all policies, processes, procedures and regulatory requirements. - If you require assistance or advice on implementing them in your role within the workplace all questions should be directed to your line manager.
Workplace	Adhere to all WH&S policies and procedures

Health and safety	- Take reasonable care of self and others who may be affected by actions taken in the workplace - Avoid wilful interference with or misuse of items or facilities provided for health & safety - Report all incidents/accidents – even near misses - Provide solutions and be proactive in preventing incidents
Values	Performance Standard
<i>BE CARING / BE POSITIVE / BE EMPOWERING / BE EXCELLENT</i> <i>Our business and team work according to these values</i>	
Care	People are our greatest asset
Be Positive	Positive intent drives better outcomes
Be Empowering	We lift capability and help others succeed
Be Excellent	Better is always possible
Expected Behaviours	Performance Standard
<i>We support each other</i> <i>We actively look for better ways</i> <i>We Speak up about problems and come with solutions</i> <i>We communicate early, clearly and respectfully</i>	