David Allen

Job Description

Job Title:	Accounts Manager
Department:	Workington
Line Manager:	Managing Partner
Line Management Responsibilities:	Yes

Aims and purpose of the job:

To effectively manage the operation of the Workington office. To line manage and motivate the Workington team, ensuring work is carried out accurately and efficiently at all times.

To effectively manage a portfolio of clients, delivering high quality, compliant and efficient services through excellent customer service.

Generic role duties to include:

1.	To effectively manage a portfolio of accounting clients including sole traders, partnerships, and limited companies, providing an excellent level of customer service through all client interactions.
2.	To allocate and organise workflow efficiently ensuring work is prioritised accordingly and all filing deadlines are met.
3.	Where you have a billing target, to ensure that you achieve this each month with a minimum recovery of 95%.
4.	To ensure that the information on all files is clear, organised, and covers all required and relevant items including personal tax positions ahead of meetings with clients.
5.	To ensure all work produced is accurate, to the highest standard and in accordance with relevant legislation.
6.	To develop your knowledge and understanding of each client that we work with, ensuring that we are meeting their expectations.
7.	Where you work directly managing clients, to ensure that they are looked after and receiving the highest level of service.
8.	To build strong, professional relationships with clients and uphold the David Allen brand and reputation through all interactions with them to maximise client referrals to market.
9.	To strive to promote the practice, developing and introducing new client relationships into the firm.

10.	To liaise with other departments and share own personal knowledge in order to establish internal and external relationships.
11.	To carry out all statutory accounts work within a four week turn around period.
12.	To communicate clearly with the management team and partners on work being carried out.
13.	To communicate with your team daily so that you are aware of the position that work is at and any issues which may arise.
14.	To continually look for ways to improve and develop the department and improve efficiencies.
15.	To deal with all communications and ad hoc work in a timely manner, where possible replying that day and ensuring that all communications are of a high professional standard.
16.	To monitor non-chargeable time for members of your team, ensuring this is minimal with the majority of the team having no more than 5% admin time.
17.	To effectively manage and motivate the team, ensuring they are working efficiently, working to meet deadlines and budgets, and achieving recoveries of at least 95%.
18.	To lead your team by setting high standards and being professional in all that you do.
19.	To ensure that assistance, support and further training is provided to the team where needed on technical issues.
20.	To effectively manage staff. Duties to include but not limited to the below: • To prepare, record, and conduct appraisals for all team members. • To carry out inductions for new staff members joining the firm. • To conduct monthly probation reviews for new team members as applicable. • To review and approve timesheets, glide time, and holidays to ensure correct staffing levels and department cover are maintained at all times. • To complete return to work interviews and relevant paperwork in the event of staff absence. • To ensure that each member of your team is working to the firm's expectations and that any development needs are identified and acted upon. Where they are not meeting expectations ensure this is effectively managed.

Central duties

21.	To represent the business when required to ensure positive links, relations and networks.
22.	To show a commitment to equality, diversity, and inclusion (EDI).
23.	To undertake personal development necessary to ensure effective performance in the role.
24.	To participate in relevant and appropriate training and development as required.
25.	To demonstrate the David Allen values of ambition, professionalism, knowledge, integrity, and respect in the work you do and during your appointment.

Method of working

The David Allen Group expects all staff to work effectively, both as individuals and as part of a team, delivering high quality services and support to clients and staff. In doing so, the company expects all staff to display all of the core competencies as defined in the performance and development appraisal arrangements and to conduct themselves in a manner which befits their professional status and responsibilities.

Public relations

Considerable importance is attached to the role the business plays in its various communities. It therefore follows that all staff are expected to work to maintain and develop these relationships at every opportunity by positively promoting the work of the business and the role it can play in supporting the aims of its stakeholders.

This job description is a guide to the work the post holder will be required to undertake. In consultation with the post holder, it may be amended from time to time by the line manager to meet changing circumstances or business needs. Specific targets and objectives will be agreed with the post holder and will be reviewed regularly as part of the performance management arrangements.