

## Job Description

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| <b>Name:</b>                             |                                  |
| <b>Job Title:</b>                        | Business Administrator           |
| <b>Department:</b>                       | Dumfries                         |
| <b>Line Manager:</b>                     | Accounts and Software Specialist |
| <b>Line Management Responsibilities:</b> | None                             |

### Aims and purpose of the job:

To assist and work as part of a team to aid the efficient running of the Dumfries office on a day-to-day basis, ensuring adherence to policies and procedures whilst delivering an exceptional level of customer service to clients and internal staff members.

### Generic Role Duties to include:

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| 1. | To maintain adequate stocks of necessary office supplies within the department.                                                                                                                                                                                    |
| 2. | To manage all department administration and perform routine admin tasks as requested.                                                                                                                                                                              |
| 3. | To produce letters, invoices, forms and documents for all the office within agreed timescales.                                                                                                                                                                     |
| 4. | To manage the accurate recording of information in the back-office system, including manual and electronic records, ensuring that all records are stored and processed securely and confidentially in full compliance with statutory requirements.                 |
| 5. | To look after clients in a friendly and professional manner, acting as ambassador for the team when required.                                                                                                                                                      |
| 6. | To collate information accurately from clients and providers via telephone, accounts tracker, email, and other sources as appropriate. To ensure that client documents are directed to the correct personnel and that client documents for signature are returned. |
| 7. | To review information received from clients and identify any further information required in a timely manner.                                                                                                                                                      |
| 8. | To ensure that all client documentation is kept neatly organised, labelled, stored and returned following GDPR legislation.                                                                                                                                        |
| 9. | To assist with the billing for the department and send fees out to clients in a timely manner.                                                                                                                                                                     |

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| 10. | To collate accounts and tax information to send to the client with fees either by post or to the central admin team to send by either email or portal.       |
| 11. | To manage the reconciliation of fees if required.                                                                                                            |
| 12. | To assist the Team Manager to identify ways to improve and develop the departmental and back-office systems, ensuring streamlined and accurate processing.   |
| 13. | To deal with all communications in a timely manner and ensure they are of a high professional standard and using David Allen brand guidelines and templates. |
| 14. | To maintain your own knowledge by attending workshops and further training as advised.                                                                       |

## **Team Specific Duties:**

|     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
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| 15. | To arrange appointments with clients and manage Relationship Manager diaries and travel arrangements accordingly.                                                                                                                                                                                                                                                                                                                                                                  |
| 16. | <p>To act as the office's main representative for front-of-house tasks. Duties to include but not limited to:</p> <ul style="list-style-type: none"><li>• Welcoming visitors to the office in a polite, professional, and friendly manner, upholding the David Allen brand values through all interactions with the public.</li><li>• Answering all general telephone enquiries directed to the office in a courteous manner, picking up the telephone within two rings.</li></ul> |

## **Central duties**

|     |                                                                                                                                                       |
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| 17. | To represent the business when required to ensure positive links, relations and networks.                                                             |
| 18. | To show a commitment to diversity, equal opportunities and anti-discriminatory practices.                                                             |
| 19. | To undertake personal development necessary to ensure effective performance in the role.                                                              |
| 20. | To participate in relevant and appropriate training and development as required.                                                                      |
| 21. | 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.