

Client Services Co-ordinator

Client Services Co-ordinators undertake work that supports audit and advisory staff (including partners and audit managers) to deliver an excellent service to clients of Sayer Vincent.

Client Services Co-ordinators work as part of the client services team, alongside other support staff. The role is varied and involves taking a flexible approach to undertake tasks from more administrative work through to taking on day-to-day preparatory work for audits, working closely both with trainee accountants and professionally qualified staff. Exceptional communication skills are required to enable effective relationships to be built with clients and internal colleagues (who often spend a significant part of their time working outside the office), alongside proficiency in office support processes and use of IT applications. These roles are key to the firm delivering both its audit and advisory work for clients – the role holders are a very important part of the firm. To succeed in the role, role holders will gain an understanding of the different stages of the audit process to enable them to proactively support audit/advisory staff.

Responsibilities

- Deliver all audit and advisory support tasks. These tasks include, but are not limited to:
 - Preparing template accounts in Microsoft Excel
 - Generating and updating standard documents in Microsoft Word, Excel and PowerPoint
 - Preparing and printing standard audit documents for the audit file
 - Editing and finalising accounts based on instructions from audit staff
 - Preparing invoices
 - Checking, updating and inputting to data fields on Drive, the firm's customer relationship management and practice management database
 - Preparing and sending bank letters (to confirm client bank details), then checking for their receipt and chasing clients as necessary
 - Setting up electronic and manual filing, archiving files as necessary
 - Managing electronic calendars and booking meetings as required
- Develop knowledge of the audit process in order to provide proactive support
- Set up, implement, develop and use processes and systems as necessary; set up appropriate tracking and monitoring systems for all on-going work as necessary; take personal responsibility for getting the job done, reprioritising to meet deadlines as necessary
- Effectively proofread all written communications to represent Sayer Vincent professionally to clients, including reviewing documents written by others, ensuring that the firm's 'style guide' is adhered to

- Learn proactively through doing the job about the aims and objectives of the not-for-profit / social purpose sector and how these are reflected in the support required by client organisations from the audit process and through the firm's other areas of work
- Attend internal and external events and meetings as required (with the requirement on occasion to travel), taking minutes or action notes if required
- Organise work and ensure delivery, taking on diary management using Microsoft Outlook and making travel and accommodation arrangements for others as required
- Handle enquiries in relation to client needs, working to resolve issues effectively where these arise in order to retain relationships positively
- Use the firm's IT systems (including our customer relationship management and practice management database, Drive) to ensure that information is maintained accurately at all times to support our work, and to contribute to an approach of shared ownership and stewardship of this data across the organisation
- Assist with the preparation of materials for training courses
- Provide administrative support for marketing events when needed, including attending events off site to meet and greet delegates
- To undertake general administrative support tasks for the firm as required e.g. answering the phone, dealing with incoming and outgoing post, filing, photocopying, responding to queries, booking couriers, ordering stationery etc
- Scheduling audit and advisory work as instructed, using the firm's electronic work scheduler
- Contribute ideas for the on-going development and enhancement of client services team processes
- To cover for other Co-ordinator members of the team as required, meeting and greeting clients as necessary
- Share skills and knowledge with colleagues regularly, and with temporary staff as required
- To be aware of commercial and client confidentiality at all times
- Any other tasks in line with the responsibilities of the role

Person specification

Qualifications

- GCSEs in Maths and English at grade C/4 or above, or equivalent level qualifications in Maths and English

Work experience

- At least 1 year of administrative experience gained within a busy office environment, either via paid or voluntary work
- Experience of proof reading documents
- Experience of offering exceptional customer service

Skills and knowledge

- Desire to work quickly and responsively, with the ability to prioritise tasks effectively to get the job done
- Successful experience of meeting deadlines
- Successful experience of taking shared ownership of tasks within a team to reach a desired outcome
- Excellent IT skills, including use of the internet, databases, and MS Office (particularly Excel, Word and PowerPoint)
- Touch typing (minimum of 40 words per minute)
- Numerate and able to work with data
- Good attention to detail
- Exceptional communication skills; the ability to communicate effectively at all levels and to different audiences, both verbally and in writing
- Desire to develop competence and knowledge continually, based on self-analysis of skills and feedback from others
- Experience of working collaboratively with colleagues and clients
- Willingness to share knowledge and proactively develop the skills of colleagues
- Openness to new ideas and different ways of working, and the ability to take on new tasks and areas of delivery continually