

Client Manager

Brief

Onyx Accountants Ltd is an expanding Accountancy Business with two offices based in Aston, Birmingham and Tettenhall, Wolverhampton.

As well as servicing standard Compliance and Tax work, Onyx Accountants aims to service its clients through a pro-active management accounts and consultancy service. This is in the form of either servicing businesses as a Finance Manager/Director through to a completely outsourced out-sourced Finance Service.

Currently the business has 425 Clients and the aim is to grow this in the next 12 months to at least 500 clients by the end of Summer 2023.

Job Purpose

At Onyx Accountants, we aim to produce Finance Information that Companies Understand and Utilise. You will report directly into the Client Advisors and will contribute to the business by:

1. Accountable for the Accounts Production Process by managing the Accounts Assistants workloads and deadlines
2. Delivering Efficiency through understanding clients business and finance processes
3. Accountable for Practice compliance with regards respective accounting bodies
4. Accountable for the delivery of the overall Onyx Strategy and Objectives as a member of the Senior Management Team
5. Maintain excellence in Communication and Customer Services
6. Aim to increase the Quantity and Quality of the Onyx Accountants Client Base.

Task Objectives

1. Support in the Production of Annual Ltd Co Accounts in IRIS for all Clients within 4 months of Year End
2. Client Account Management and Relations including 24 Hour Comms Response (Client Charter)
3. Undertake the Compliance Work and facilitate Client Advisory work within the Practice
4. Ensure ALL statutory compliance deadlines are met for clients under management
5. Manage ALL HMRC Client queries
6. Delivery in the completion of Self Assessments by the end of October 21 for Core Clientele
7. Delivery and Development of all Tax deadlines and advice to clients
8. Delivery of the Management Accounts and Outsourced Finance Services with support from Assistants
9. Support Advisors with Business Improvement Projects in line with SMART objectives on a case by case basis
10. Delivery of Assistants 1-2-1's



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1. Key Pre-Requisites

In order to succeed in this role, it is expected that you have the following work experience

- Strong Customer / Client Management Experience
- Excellent Written and Verbal Communication Skills
- Experience in using On-Line Accounting systems
- Basic Level Accountancy Knowledge Minimum AAT Level 3
- Strong Microsoft Excel Skills (VLookups / IF and Pivot Tables desirable)

2. Behavioral Objectives

In order to succeed in this role, it is expected that you will actively follow, demonstrate and instil the Onyx Culture across the business.

- Delight our customers
 - *Customer satisfaction is our primary focus*
- Keep it simple
 - *Provide simple solutions to complex problems*
- Deliver Excellence
 - *Ensure we deliver high standards the first time*
- Aim High
 - *Strive to improve our own skills, processes any systems*
- Communication is key
 - *Internally and externally be open, honest, responsive and truthful*