

Reception & Administration

Job Description

Position Summary:

You will be responsible for welcoming clients and visitors through the doors. You will also provide effective and efficient administrative support for the branch team. You shall assume the role of Personal Assistant, ensuring client communications are handled effectively and in a professional manner.

Under the guidance and supervision of the administration team lead, you will be expected to self-manage the priorities and demands of the day. You will demonstrate maturity in your decision-making, be well-organised, have a proactive attitude, and ensure all tasks are completed accurately and to a high standard.

Our Business

CooperAitken is a multi-branch Chartered Accountancy business with a long-established history of providing accounting excellence to our rural, commercial, and family clients.

Our philosophy is to work closely with our clients assisting them to grow and develop.

Providing the best in accountancy services, taxation advice and speciality services such as Trust & Companies, Software, ACC and External payroll.

We maintain a passion and commitment to our clients, staff, and community - to add value and to be the best provider of the services we offer.

Functional Relationships:

Internal

Directors
Management Team
Client Managers & Team Leads
Accounting Teams & Specialists Divisions
Administration staff

External

Clients
Other Professional services
Trade professionals
General public

Role Details:

Location: Thames; travel to other branches may be required on occasion.

Division: Administration

Reports to: Office Manager

Direct Reports: Nil

Hours of work:

37.5 - 40 hours per week from Monday to Friday.

Key Responsibilities:

Reception

- Receiving and directing clients and visitors.
- Answering the telephone and redirecting calls to the appropriate people.
- Taking documents from Clients, marking them in and distributing them to the correct person.
- Screening enquiries and requests either by email or phone and handling them when appropriate.
- General office needs, e.g stationery orders, office consumables, deliveries and postal/courier services.
- Organising office and client areas.

Administration

- Filing, Scanning, Printing and Photocopying
- Data entry and database maintenance, e.g client updates, document management
- Calendar management for team members
- Typing, Dictaphone and Minute taking.
- Supporting the branch technology set-up.
- All other general administration duties as and when required, e.g. Debtors and PA support

Personal Assistant

- Calendar management for selected partners; assessing priority of appointments and coordinating meetings as required.
- Screening enquiries and requests either by email or phone and handling them when appropriate.
- Processing Client Invoices.
- Proofreading, with the ability to maintain a high level of accuracy and attention to detail.
- Act as a key liaison point between Partners and other parties, sharing key information and maintaining good communications.
- Excellent interpersonal and communication skills; act as a liaison point between Partners and other key parties, both internal and external to the company.

Experience, Skills and Attributes:

- Previous experience in a Receptionist or Administrator role is essential.
- Strong computer literacy with proven experience using Microsoft Office Suite (min. intermediate level).
- Excellent interpersonal skills including a confident phone manner.
- Excellent verbal and written communication skills;
- Strong organisational and time management skills; ability to multi-task and prioritise workload.
- Adapting to new tasks with ease, demonstrating the ability to follow processes and meet deadlines.
- improvements and streamline work practices where appropriate.
- Demonstrate discretion and confidentiality.
- Professional personal presentation.

Organisational Accountabilities:

Quality & Risk:

Actively participate in continuous quality improvement and risk management, both at a professional and divisional level, by consistently seeking ways to continually improve processes and procedures and identifying opportunities to minimise risks.

Health & Safety:

- Actively participate and comply with the requirements of the Health & Safety Work Act 2015.

At CooperAitken:

What we expect from you	<ul style="list-style-type: none"> • A positive attitude and good communication will all team members • Meet or exceed deadlines • Manage workflow and establish priorities • Health and safety procedures followed • Maintain an up-to-date knowledge of the firm's range of services
What we want from you	<ul style="list-style-type: none"> • Fit well into our team culture • Work effectively under pressure
Live into our Core Values	<ul style="list-style-type: none"> • <i>Progressive</i> - Proactively challenging the status quo • <i>Drive</i> - Going the extra mile • <i>Empathy</i> - Respecting and considering others • <i>Community</i> - Working better together • <i>Approachable</i> - Our door is always open

Declaration:

This position description is a living document. At the time of commencing in the role, the position description will be discussed between the position holder and their lead/manager, and the key accountabilities and performance measures agreed upon.

The tasks defined above are indicative and may change from time to time as the needs, priorities and objectives of the company and position change. Accordingly, the employee will undertake any other tasks and duties as agreed from time to time, subject to the provision of appropriate training.

This position description is a draft document and may be updated to reflect additional or different needs which may be identified at a later date.

Read and agreed to by:

Name:	
Signed:	
Date:	