Job Title: Senior Consultant

Reports to: Chief Executive

Supervises: Management Accountant

Key objective: To manage provision of consultancy services to clients, and ensure quality of finance outsourcing carried out on clients' behalf.

Internal Relationships:
Operations Team
Consultants
Management Accountants
Marketing & Communications
New Client Acquisition Team

External Relationships:
Third party charity clients with turnover of £1 - 40million

Job responsibilities:

<u>Client Work</u>

- Manage the delivery of assigned client solutions including:
  - Provision of monthly management accounts
  - Account management and resolution of client issues through training and/or process improvement
  - Maintenance of Service Level Agreements in line with clients' needs
- Provide strategic financial support (Virtual Finance Director (VFD) service) to clients including:
  - Attending Board/Finance Committee meetings
  - Preparing and revising annual budgets
  - Preparing annual accounts and liaising with auditors
  - Other activities as required, eg policy reviews, cash management, recovery planning, forecasting and Trustee support
- Complete weekly timesheets identifying billable and non-billable time in line with profitability targets. Liaise with clients on billing queries
- Manage work schedule ensuring that potential client/project overspend against agreed budgets is identified and agreed upfront
- Carry out other work as required (eg Independent Examinations, Internal Audits, Consultancy projects):
  - Input into drafting proposals and manage process to obtain signed contracts/letters of engagement
  - Plan, agree and deliver project KPIs ensuring accurate monitoring and reports are maintained
  - Produce and agree final reports with clients
  - Manage billing in line with client agreements/expectations.

Internal Relationships & Management

- Work with other Consultants to share issues and practices across clients
- Supervise Management Accountant, dealing with issues as appropriate
- Build relationships with Operations, New Client Acquisition and Marketing teams to ensure a seamless and consistent service is provided throughout the organisation
- Manage resource constraints and other issues, advising on the most appropriate course of action to maintain customer service.

Marketing & Communications

- Identify other services that could support each client
- Meet potential clients and support the development of proposals

Knowledge/skills required:

- Experience of working in a consultancy environment: recording time for client-billing purposes, managing profitability, etc
- Commercial awareness
- Experience of managing projects and multiple priorities
- Experience of liaising with and managing third party stakeholders as part of project delivery
- Understanding of operational financial processes with knowledge of the full accounting life cycle
- Ability to gather, analyse and evaluate facts and prepare concise reports and presentations
- Excellent computer skills as well as working knowledge of mid-range accounting software packages and Microsoft Office packages

Personal qualities and attributes:

- Excellent communication skills, both verbal and written
- Confidence and ability to work with and hold together a wide range of individuals (often at very senior levels) and organisations
- Strong interpersonal skills
- Experience in staff management and related issues
- Drive and enthusiasm and the ability to work with minimum supervision
- Ability to manage priorities and balance competing workload demands and deadlines
- Ability to work in a consulting environment – i.e. flexibility, UK travel (not limited to any specific geographical area), overnight stays away, etc
- An empathy with the not-for-profit sector.

Education and qualifications:

- Qualified accountant - ACA, CIMA or equivalent
- Post qualification experience at a relevant level, ideally within the charity sector
- Achieved or studying for a recognised charity sector professional qualification (not essential).