



# Client Manager

## Job Description

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# The Role and The Business

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## The Role

Due to continued business growth, we are looking for an experienced finance professional to join the team and provide an outstanding service to our clients.

This role includes traditional accountancy tasks and also goes beyond this; it involves acting as a commercial sounding board for the client, guiding clients through their financial journey with strategic advice and actionable insights. There will be a mix of traditional year end work and providing virtual finance manager and virtual finance director services.

This role requires a proactive approach to client service, exceptional problem-solving skills, and a strong understanding of commercial drivers. Managing workload, stakeholders and deadlines will be a key part of the role.

There is an opportunity to help shape the service provided, with the ideal candidate being able to suggest improvements and additions to the virtual finance manager and director service lines.



## The Business

Our core internal value is family feel: we are a family-owned practice and want our team to feel valued, work together and thrive.

Our core external value is professional performance: we work to high standards and provide a service beyond what many small accounting firms can do.

We believe the development of a strong team, with confident, competent and supported members, is the most important factor in delivering business success.

We have doubled in revenue and team members over the last two years and this growth is set to continue; our aim is to be 4x bigger in 5 years through a combination of organic growth and acquiring other practices.

This means opportunities for the team members to grow, learn new skills and help shape the direction of the business. Every team member has an important part to play in achieving the business' headline strategy and objectives.



# The Responsibilities

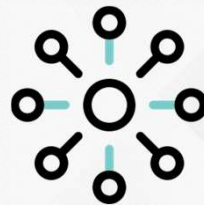
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**Client Relationship Management:** Act as the first point of contact for clients, especially when they have new ideas or require guidance, ensuring a high level of service and support.

**Data Management and Improvement:** Oversee the accuracy of financial data, identify areas for improvement, and alert clients to potential pitfalls in a timely manner.

**Financial Oversight and Advisory:** Support clients in understanding their financial figures, helping them interpret data to make informed decisions. Provide a "second opinion" and evaluate the pros and cons of potential business moves.

**Financial Reporting:** Produce reports that include analysis of profit and loss, balance sheet, customers and bank balance reviews, adding valuable commentary and comparisons to highlight significant changes



**Strategic Planning:** Offer strategic advice on cash flow management, foreign exchange, and other critical financial areas. Provide detailed reports with useful analysis, comparisons, and commentary to assist in strategic decision-making

**Client Portfolio Management:** Manage your portfolio of clients to ensure that submissions are all delivered ahead of deadline, including accounts, VAT returns, etc.

**Self Development:** Drive and motivate yourself to acquire new knowledge and skills to be the best that you can be.

**Team Development:** Sharing knowledge, experience and insights with team members. Delegate where needed – we believe strongly in the Task Triangle and Delegate to Elevate.

**Business Development:** Identify, communicate and implement opportunities to improve processes that contribute to the improvement of the business.

# The Requirements

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- Critical thinking
- Strong analytical & problem-solving skills
- Solutions-oriented mindset
- Able to adapt to different software and technology
- Commercial savvy
- Able to see the big picture and the client's perspective
- Ability to lead and self-manage
- Can-do attitude



- High emotional intelligence
- Excellent communication and people skills
- Team player
- Capable of maintaining positive client relationships
- Leading team initiatives
- Drive to learn and constantly improve



- Committed to 5-star service
- Accountancy practice and industry experience (7+ years)
- Strong technical skills and understanding of accounting and tax rules
- ACA / ACCA / CIMA qualified (if no qualification then demonstrable experience will be required)
- Experience in going beyond traditional accounting requirements of reporting and helping clients improve



# The Rewards

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- Full time role
- Office based or hybrid working
- Free onsite parking
- Comfortable modern offices
- Quarterly team lunch or away day to discuss strategy
- Flexible start / finish times to suit commitments



- Salary: £50,000-55,000 depending on experience
- Personalised development plan
- Performance related bonus scheme
- 3% pension contribution
- 23x days holiday + 8x bank holidays