

## Business Strategist

### My Purpose

To optimise **growth** through creating excitement and commitment from our customers to **creating the extraordinary**. This is achieved by establishing **genuine understanding** and delivering **clarity** and **value** to all customer segments.

### My promise to our Customers

I promise to be **impeccable** in our accounting services, our advice and our behaviour.

I promise to work hard to **understand your goals** and how we can help you *create the extraordinary*. I

promise to **make it easy** for you to work with us and I will always act in your best interest.

*I promise to be the best I can be for you.*

### How I contribute

The Business Strategist is pivotal to Qubik's success. As part of the business development and sales team, the Business Strategist is the first engager with our potential clients. Nurturing them from the outset and working hard to understand their needs, the Business Strategist collaborates to create a compelling value proposition, leveraging selling and accounting expertise as needed from within the team, resolving issues and overcoming objections in order to engage, convert and win.

#### Engage

- The Business Strategist engages the potential client, leveraging superior interpersonal skills, to drive confidence, trust, transparency and disclosure.
- The Business Strategist engages the Customer Service and Accounting teams to ensure that clients are onboarded seamlessly.

#### Consult

- The Business Strategist consults with the client, gaining understanding of the issues to be resolved, creating clarity around business and growth opportunities and defining the necessary solutions.
- The Business Strategist consults with the broader Qubik team, identifying and leveraging technical and service expertise to deliver the greatest value to the client, whilst also ensuring the services proposed can be profitably and sustainably delivered.

#### Collaborate

- The Business Strategist has primary responsibility for lead conversion and/or sale closure – depending on the lead opportunity. The Strategist works with a partner to leverage combined expertise in accounting, advisory and selling - optimising value creation and sales win/loss ratios.

## Strategise

- The Business Strategist looks for the broader issues for the client, with a focus on delivering Business Advisory solutions to seek exponential growth and value for the client. Whilst compliance work will be a backbone for Qubik and our client base, the real value comes from advisory work, helping the client aspire to and achieve their dream life.

## What I do

The Business Strategist is responsible for delivering against sales targets to ensure Qubik growth objectives can be achieved. This is achieved through working within the customer acquisition system, team collaboration structure and operating rhythm.

## Client engagement

- Qualify leads and convert to opportunity – ensuring value is generated throughout each engagement.
- Facilitate initial meeting with most appropriate Strategist to optimise closure.

## Value proposition

- Identify, through establishing trust, transparency and disclosure clear value proposition to assist customer to achieve strategic and tactical goals. Leverage products and services to create relevant value for the client, maintaining Qubik profitability and margin levels.
- Identify opportunities to enhance value proposition through new and refined product and service offerings, leveraging customer feedback and measurable sales performance.

## Client acquisition

- Close sales, optimising product mix between compliance and advisory services, ensuring value is generated, understood and deliverable.
- Lock in sale through initial contract closure and seamless transition, through onboarding to the Customer Account Specialist team and Accountants.

## System compliance

- Act in alignment with the Client Acquisition System, ensuring service standards and processes are consistently met.
- Provide specific continuous improvement feedback as required to enhance team performance and revenue growth through increased price and volume.

## Retention

- Maintain engagement with new clients over initial three-month period to ensure service delivery is in line with customer expectations and initial value proposition.
- Engage directly with client if required to realign expectations or to assist in resolution when appropriate.

## Workflow Management & Budgets

- Manage own workflow planning and budget, including proactively looking for opportunities to add revenue outside of the individual budget
- Proactively work with stakeholders across Qubik to optimise sale opportunity.

## How I behave

### Qubik values

- Fun and Happiness
  - I bring the best version of myself to support, share and engage with my team and customers. I look for the fun in my workday and choose a positive outlook.
- Passion and Drive
  - I believe in Qubik and how we work together to create the extraordinary for our team and our customers and our community. I am hungry to perform and deliver value.
- Energy and Creativity
  - I am energetic and focused. I look for ways to add value and push boundaries.
- Real Relationships
  - I love being part of the Qubik team, and I love collaborating and supporting my colleagues. My Customers are part of my team and I act with integrity and always in the customers' best interest.

## My team

Reporting to the Manager - Sales, I work collaboratively across Qubik to grow our revenue, optimise our profitability and create and define real value for our customer.

Key relationships include:

Business Strategist	<ul style="list-style-type: none"> <li>• Partnership to deliver overall revenue and client acquisition goals</li> </ul>
Customer Account Specialist Team	<ul style="list-style-type: none"> <li>• Team collaboration and support to ensure continuous improvement and customer satisfaction</li> </ul>
Customer	<ul style="list-style-type: none"> <li>• Initial engagement; establish understanding and value proposition</li> </ul>
Accountant Team	<ul style="list-style-type: none"> <li>• Collaborate to define and optimise value for customers</li> </ul>
Business Enablement	<ul style="list-style-type: none"> <li>• Continuous improvement input and quality assurance</li> </ul>
Manager - Operations	<ul style="list-style-type: none"> <li>• Technical Expert</li> <li>• Escalation point as needed</li> </ul>
Manager - Sales	<ul style="list-style-type: none"> <li>• Coach and leader</li> <li>• Escalation point as needed</li> </ul>
Chief Operating Officer	<ul style="list-style-type: none"> <li>• Escalation point as needed</li> </ul>

## How I am measured

The Business Strategist will be measured on

- Revenue generation
- Lead conversion
- Win/loss ratio
- System and service standard compliance
- Retention

- Customer Satisfaction (specific measure to be developed)
- Team engagement

### My skills and experience

- At least 5+ years extensive accounting experience
- Superior client management and interpersonal skills
- Excellent verbal and written communication skills with all levels
- Salesforce experience will be valuable but is not essential
- Ability to work both independently and as part of a team

### Key Attributes and Competencies

- Values-driven by nature, you can demonstrate the link between values and work output
- Highly organised, with experience managing multiple priorities
- A high level of planning and problem-solving ability. Able to navigate work with ambiguous details.
- Strong verbal, written and interpersonal communication skills – you communicate with influence.
- Showing initiative, taking ownership and proactively thinking of solutions to problems
- Growth mindset
- Resilience, particularly necessary to manage the impact of rejection, to ensure every new lead receives the best service experience and focus