

Senior Accountant

My Purpose

To optimise **retention** and **growth** through creating an **extraordinary customer experience**, achieved by establishing **real relationships** and delivering **impeccable accounting** and **advisory services** 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 Senior Accountant is pivotal to Qubik's success. As part of the Accounting team the Senior Accountant works collaboratively with the Customer Account Specialist team to deliver our accounting and advisory services. The technical expert in the team, the Senior Accountant directly and indirectly, leveraging the offshore team and the Customer Account Specialist team, delivers the majority of client services.

Deliver

- The Senior Accountant is a technical expert, providing exceptional advisory and compliance services, optimising achievement of fees and budgets.
- Delivery is not only best practice, delivered in line with the clients' best interests, it is timely professional and personable.
- Where possible the Senior Accountant leverages the offshore team, intermediate and junior accountants and the Customer Account Specialists, actively seeking ways to improve service, whilst reducing cost to serve.

Coach

- The Senior Accountant is a super coach – coaching the customer in advisory matters, and how to create a strong, compliant business; coaching the Intermediate, Junior and offshore accountants, to build capability and competency in all accounting matters; coaching the Customer Account Specialist team in complex service issues, financial management processes and basic accounting disciplines – all aimed at improving the overall service experience and delivering impeccable accounting and advisory services.

Grow

- The Senior Accountant is a major ally for our business development team. Leveraging expertise and deep customer understanding, the Senior Accountant actively pursues opportunities to retain and grow with the customer. Growth and retention are driven from a customer experience

perspective, through creating loyalty through performance, and seeing opportunities to generate additional value for the customer.

What I do

The Senior Accountant is responsible for collaborating across the business to achieve budget through delivering impeccable accounting and strategic advisory services for the Customer.

Client acquisition

- Provide guidance, when required to the sales team during the procurement stage around cost, general accounting knowledge, service delivery expectations)

Client retention and growth

- Leverage relationship and understanding of business challenges to recognise and generate value opportunities for the client
- Develop amendment to existing proposal to include additional activities as needed

Strategic Advisory service

- Lead Strategic and Business Advisory activities, including but not limited to
 - Facilitate initial and subsequent quarterly strategic planning and review meetings
 - Establish, document and facilitate understanding of key deliverables
 - Dream life
 - Strategy on a page
 - Three-way forecast
 - Complete specific accounting and advisory activities for client
- Maintain strong, frequent, consistent and transparent communication with client, reinforcing engagement and ensuring no gaps in expectations or information
- Support CEO and/or Strategic Advisor with any significant client engagements as needed

Accounting and compliance services

- Conduct annual tax planning; ensure understanding and commitment to activities resultant from tax plan; schedule activities accordingly
- Ensure compliance and tactical accounting activities are completed fully, accurately and on time, leveraging the ARO team wherever possible

Project based consultancy

- This client base is complex and may require any number of activities to be completed on a project basis. Such activities and projects may include
 - Creating finance and leverage options
 - Offsetting in-house gaps in, and/or supporting, financial management capability
 - Business planning including People, Market, Assets planning, optimising, operationalising
 - Sale, Merger, Acquisition activities
 - Cost Cutting Initiatives – stringent analysis of costs and where savings can be made
 - Asset Protection

Accounting & Tax

- Facilitating understanding, education and leverage opportunities within the tax system

- Providing legal/ compliance advice
- Preparing all manner of compliance and accounting documents, work papers, statements etc.

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 to manage client invoicing
- Ensure budgets are done on each job before starting the job
- Understand and communicate to manager own monthly and cumulative monthly budget identifying any gaps at the commencement of the month

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.
- 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 Manager - Operations, I work collaboratively across Qubik to optimise our profitability and the value we deliver our customer.

Key relationships include:

Business Strategist	<ul style="list-style-type: none"> • Baton pass from sale to onboarding; Customer brief and set up
Customer Account Specialist Team	<ul style="list-style-type: none"> • Team collaboration and support to ensure continuous improvement and customer satisfaction
Customer	<ul style="list-style-type: none"> • Customer Account Specialist is first and primary contact point for queries and follow up
Accountant Team	<ul style="list-style-type: none"> • Collaborate to provide service experience to Customers • Complete key deliverables for Customer; supported and communicated by Specialist
Business Enablement	<ul style="list-style-type: none"> • Continuous improvement input and quality assurance
Finance	<ul style="list-style-type: none"> • Escalate variation or collection issues from Customer

Manager – Operations	<ul style="list-style-type: none">• Clarity and direction for service standards and retention effort• Technical Expert• Escalation point as needed
Chief Operating Officer	<ul style="list-style-type: none">• Coach and leader• Escalation point as needed

How I am measured

The Senior Manager will be measured on

- Fees and budgets
- Customer Satisfaction (specific measure to be developed)
- Service standard compliance
- Technical competency
- Team engagement

My skills and experience

- At least 5+ years accounting experience
- Qualified CA or CPA
- Bachelor’s degree or higher in Accounting, Finance or similar
- Superior client management and interpersonal skills
- Superior leadership skills and people management skills
- Excellent verbal and written communication skills with all levels
- Solid technical compliance skills and strong analytical, problem solving, and advisory skills
- Knowledge/experience with XERO and Practice Manager- Workflow Max is desirable

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.
- Proven leadership capability, with demonstrated team development and capability build
- Strong verbal, written and interpersonal communication skills – you communicate with influence.
- Showing initiative, taking ownership and proactively thinking of solutions to problems
- Growth Mindset