

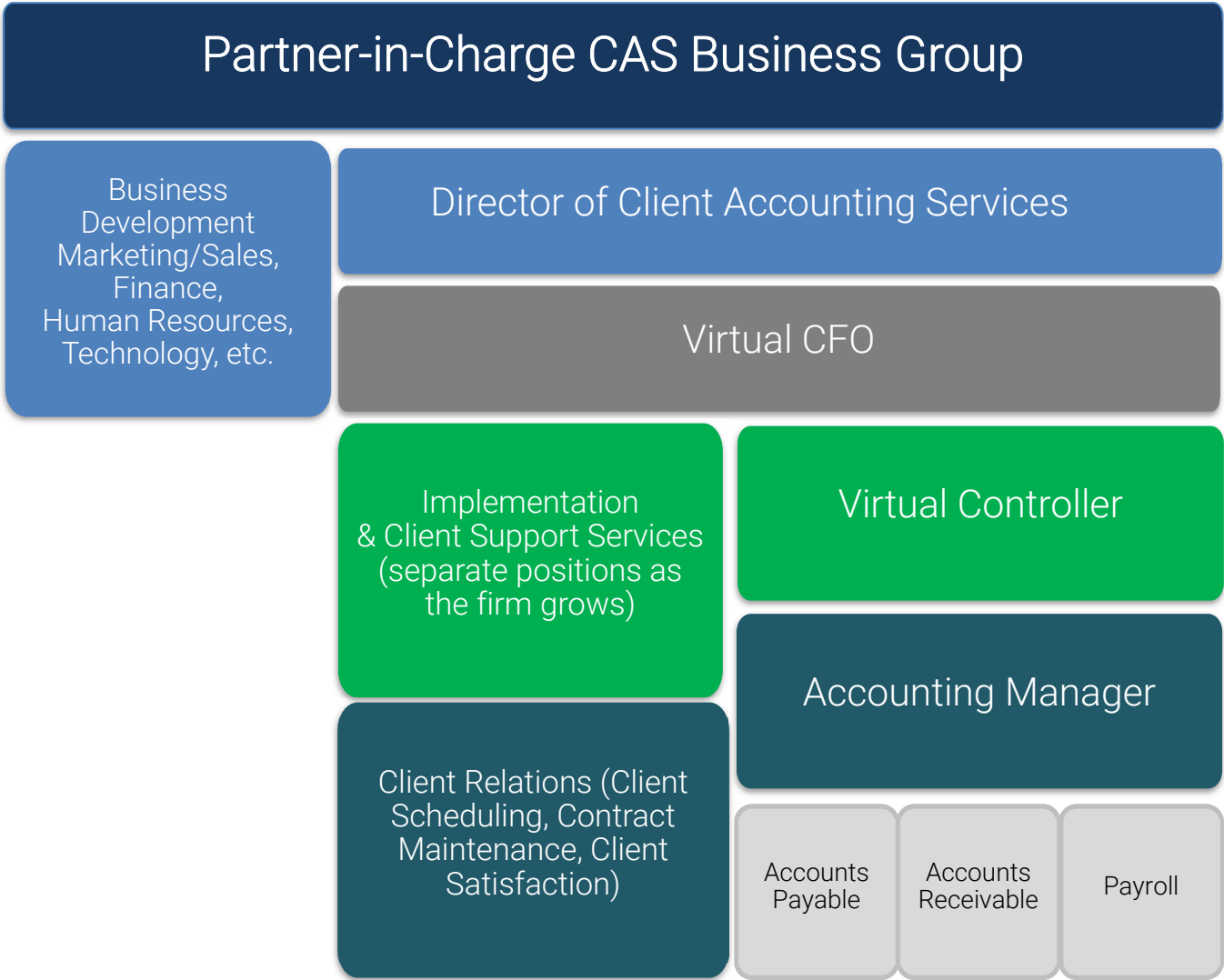
Staffing the Client Advisory Services Firm —

Sample Organization Chart and Job Descriptions



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Assemble Your Team



ROLE: CLIENT RELATIONS ASSOCIATE

Purpose	The Client Relations Associate role is responsible for providing exceptional client service, primarily via phone and email/web-based interaction. Is responsible for client scheduling of Service Order Requests, support requests and other matters. Maintains CRM in support of the CAS team. Will complete special projects as assigned.
Reports to/ Accountability	Manager of Client Implementation and Support Services
Key Success Factors	• Ability to learn new skills quickly and adapt easily to unexpected situations as they arise • Adapts easily to learning new software applications and demonstrates proficiency with core applications necessary for this position • Co-operative team player • Extremely organized • Client-centric approach to all matters
Responsibilities	• Serves as a Gatekeeper for all other members of the CAS team by handling routine emails, telephone calls and other direct communications received from CAS clients • Reviews and assists with scheduling of Service Order and support requests received from clients • Supports/assists with routing of Service Order requests to sales team, to Client Support or to the 3rd party software solution vendor where appropriate • Scheduling and confirmation of weekly, monthly and other virtual/phone/on-site meetings for the CAS team, with related telephone and electronic client communications • May participate as part of the Marketing Committee and manage firm blog posting on social media sites, including assisting with the gathering of industry information and development of content • Direct contact with 3rd party vendors for routine client account and support matters • CRM database records maintenance and updates with periodic deep clean-up • Director of Client Celebrations and Rewards • Prospect networking at general business, association and other functions • Liaison with sales and marketing team • Assists in proposal development • Assists with client communications and management to support the CAS Accountant and other department staff • Special projects as assigned
Key Performance Indicators	• Demonstrated record of retention of application of technical skills • Quality of work output • Integration into the team • Meeting assignment objectives (timeframes, budgets, outcomes) • Client satisfaction
Qualifications/ Skills and Experience/ Personal Attributes	• Associates Degree in Accounting, a minimum, Bachelor's Degree preferred. College interns in their junior or senior year with a major in accounting will be considered. • Strong technology skills using Microsoft Office 2007 or later (Word, Excel, PowerPoint, and Outlook at a minimum, more applications preferred) • Prior experience in a customer/client service role, preferably including both business-to-business support and individual consumers • Prior accounting/bookkeeping experience strongly preferred • Home office environment, including separate work area, PC (minimum system requirements must be met) with Windows 7. Additional technology requirements will be communicated to candidates selected for this position and must be met on an ongoing basis. • Experience working in a paperless environment strongly preferred • Strong interpersonal and relationship building skills • Team player with a positive can-do approach

	• Experience preparing and demonstrating technology solutions and/or web-based and live PowerPoint presentations helpful • A general and growing knowledge of firm products and services in the practice area, and a general knowledge of products and services in other practice areas
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ROLE: ACCOUNTS RECEIVABLE SPECIALIST

Purpose	The Accounts Receivable Specialist is responsible for supporting our clients in the areas of customer invoicing, recording of deposits, and supporting our clients with customer collections.
Reports to/ Accountability	Accounting Manager
Key Success Factors	• Excellent communication skills via telephone, video conference, email and in all other formats as interaction with client customers may be frequent • Co-operative team player • Extremely organized • Client-centric approach to all matters
Responsibilities	• Processing of Client Invoices to Customers • Posting Customer Payments (recommended that this function and the above are assigned to different staff members when possible) • Downloading/entry of revenues from 3rd party applications or banks • Customer sales tax exemption certificate administration • Preparation of sales tax reports for review by Accounting Manager • Prospect networking at general business, association and other functions • Special projects as assigned
Key Performance Indicators	• Demonstrated record of retention of application of technical skills • Quality of work output (on-time and accurate delivery) • Integration into the team • Timely processing of customer invoices • Client satisfaction
Qualifications/ Skills and Experience/ Personal Attributes	• Associates Degree in Accounting, a minimum, Bachelor's Degree preferred. College interns in their junior or senior year with a major in accounting will be considered. • Prior bookkeeping experience required, with specific experience in an Accounts Receivable environment that processes a high volume of invoices preferred • Strong technology skills using Microsoft Office 2007 or later (Word, Excel, PowerPoint, and Outlook at a minimum, more applications preferred) • Home office environment, including separate work area, PC (minimum system requirements must be met) with Windows 7. Additional technology requirements will be communicated to candidates selected for this position and must be met on an ongoing basis. • Experience working in a paperless environment strongly preferred • Strong interpersonal and relationship building skills • Team player with a positive "can-do" approach • A general and growing knowledge of firm products and services in the practice area, and a general knowledge of products and services in other practice areas

ROLE: ACCOUNTS PAYABLE SPECIALIST

Purpose	The Accounts Payable Specialist is responsible for the timely and accurate processing of client Accounts Payable transactions. This includes the entry of vendor bills received by the client, as well as the download/data entry and accurate coding of client credit card transactions for expenses. In addition, the Accounts Payable Specialist is responsible for ensuring that W-9 forms are received from new vendors prior to initial payments being issued, and that these forms are updated annually to maintain current and accurate information.
Reports to/ Accountability	Accounting Manager
Key Success Factors	• Ability to learn new technology software skills quickly • Attention to detail with regard to keeping current, accurate and complete vendor file information, including current W-9 and any other application forms • Commitment to accuracy when entering vendor bills and other transaction information • Co-operative team player • Extremely organized • Client-centric approach to all matters • Positive feedback from client vendors
Responsibilities	• Processing of vendor bills received for payment • Downloading and coding of credit card transactions • Preparation of draft ~~to~~ To-Be-Coded reports • Review of monthly A/P ledgers for missing routine bills • New vendor setup • W-9 administration • Monthly draft 1099 vendor report preparation for review by Accounting Manager • Prospect networking at general business, association and other functions
Key Performance Indicators	• Efficient entry of transactions with average or above-average data entry time realizations and rates of accuracy • Quality of work output • Integration into the team • Client and client vendor satisfaction
Qualifications/ Skills and Experience/ Personal Attributes	• Junior level standing in an accredited university with a grade point average of 3.3 or higher, or a completed Associates Degree with a grade point average of 3.3 or higher • Strong technology skills using Microsoft Office 2007 or later (Word, Excel, PowerPoint, and Outlook at a minimum, more applications preferred) • Ability to multi-task and to work independently with minimal supervision • Home office environment, including separate work area, PC (minimum system requirements must be met) with Windows 7. Additional technology requirements will be communicated to candidates selected for this position and must be met on an ongoing basis. • Experience working in a paperless environment strongly preferred • Strong interpersonal and relationship building skills • Team player with a positive ~~can-do~~ approach • A general and growing knowledge of firm products and services in the practice area, and a general knowledge of products and services in other practice areas

ROLE: PAYROLL SPECIALIST

Purpose	The Payroll Specialist role is responsible for the timeline and accurate processing of new hire and ongoing employee documents for clients and their staff. This includes assisting the client and their staff with the completion of new hire and other required human resource forms. It also includes the accurate setup of new hire information in the payroll processing system. The Payroll specialist processes payroll for each client company on a pre-determined schedule and then reviews the payroll reports for accuracy. Information regarding special payments such as benefit obligations, garnishments and other balances are communicated to the Accounts Payable Department by the Payroll Specialist.
Reports to/ Accountability	Accounting Manager
Key Success Factors	• Extreme attention to detail and accuracy • Ability to work efficiently and to multi-task • Ability to work independently, with minimal supervision • Able to learn new technology skills quickly • Co-operative team player. • Extremely organized • Client-centric approach to all matters
Responsibilities	• In-house payroll processing and download/filing of payroll returns • New hire setup and communications • Coordination with client support for payroll agency correspondence matters • Garnishment, benefit plan obligations and other required reporting to Accounts Payable • Download of payroll transactions if processed by 3rd party
Key Performance Indicators	• Ability to apply skills learned in one client setting to similar situations with other new or existing clients • Timeliness and accuracy of completed work • Integration into the team • Satisfaction of client and of the client's employees with regard to payroll processing management and employee/client support
Qualifications/ Skills and Experience/ Personal Attributes	• Associates Degree in Accounting, a minimum, Bachelor's Degree preferred • Prior bookkeeping experience required, with specific experience in a position that processes a high volume of weekly payroll transactions • Strong technology skills using Microsoft Office 2007 or later (Word, Excel, PowerPoint, and Outlook at a minimum, more applications preferred) • Home office environment, including separate work area, PC (minimum system requirements must be met) with Windows 7. Additional technology requirements will be communicated to candidates selected for this position and must be met on an ongoing basis. • Experience working in a paperless environment strongly preferred • Strong interpersonal and relationship building skills • Team player with a positive can-do approach • A general and growing knowledge of firm products and services in the practice area, and a general knowledge of products and services in other practice areas

ROLE: ACCOUNTING MANAGER

Purpose	The Accounting Manager is responsible for all areas relating to financial reporting for firm clients. This position will be responsible for developing and maintaining accounting principles, practices and procedures to ensure accurate and timely financial statements. The Accounting Manager supervises the Accounts Receivable, Accounts Payable and Payroll Specialist staff and is responsible for managing the team to ensure that work is properly allocated and completed in a timely and accurate manner. This position addresses tight deadlines and a multitude of accounting activities, including general ledger preparation, financial reporting, year-end client tax and audit projects, and the support of budget and forecast activities. The Accounting Manager will have contact with clients and client contacts, including the client's tax accountant and other professional service providers.
Reports to/ Accountability	Virtual Controller
Key Success Factors	• Ability to manage and motivate a team • Superior ability to prioritize and focus in a high-paced, multi-tasking environment • Ability to quickly learn and use new technology software applications • Positive telephone, email and other communication skills as contact with clients and others will be extensive and ongoing • Commitment to protecting client privacy, even within the firm, as appropriate • Ability to apply self to learning and applying technical skills • Co-operative team player • Interest in personal and professional development and advancement
Responsibilities	• Overall day-to-day management of financial reporting accuracy and on-time processing of client information • Bank and other balance sheet account reconciliations • Payroll reconciliations • Review and approval of account classifications • Review of G/L for any missing transactions and overall accuracy • Management of weekly ~~to~~ Open Items and ~~to~~ To-Be-Coded lists, supervised/reviewed by the Controller • Preparation of initial/draft Management Reporting Package each month, for completion by Controller • New staff assigned ~~to~~ buddy and orientation manager • Client Password Vault maintenance (managed by Controller) • Supervision and management of A/R, A/P and Payroll staff • Routing of Sales Tax and other reports for preparation within the firm
Key Performance Indicators	• On-time delivery of client financial reporting packages • Low error rates and overall quality of work output • Motivating and effective management skills • Integration into the team • Meeting assignment objectives (timeframes, budgets, outcomes) • Ability to work independently in a sometimes-stressful environment with extensive multi-tasking demands • Client satisfaction • Participation in firm wide initiatives • Learning and demonstration of evolving accounting and technology skills

Qualifications/ Skills and Experience/ Personal Attributes	• Bachelor's Degree in Accounting with a minimum GPA of 3.3 • Prior bookkeeping experience required that involved processing of Accounts Payable, Accounts Receivable and Payroll. Experience preparing payroll and sales tax returns strongly preferred. • Prior experience managing a staff strongly preferred • Strong technology skills using Microsoft Office 2007 or later (Word, Excel, PowerPoint, and Outlook at a minimum, more applications preferred) • Home office environment, including separate work area, PC (minimum system requirements must be met) with Windows 7. Additional technology requirements will be communicated to candidates selected for this position and must be met on an ongoing basis. • Experience working in a paperless environment strongly preferred • Strong interpersonal and relationship building skills • Team player with a positive can-do approach • A general and growing knowledge of firm products and services in the practice area, and a general knowledge of products and services in other practice areas
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ROLE: VIRTUAL CONTROLLER

Purpose	The Virtual Controller position is responsible for managing the ongoing financial reporting operations of the firm on behalf of each Outsourced Accounting client. This includes the review of periodic financial reports prepared by the Accounting Manager, preparation of budget, KPI and other management reports, and a comprehensive set of controls designed to mitigate risk, enhance the accuracy of the client's reported financial results, and ensure that reported results comply with generally accepted accounting principles. The Virtual Controller also serves as the primary liaison between the client and the client's tax preparer and other professional service providers.
Reports to/ Accountability	Virtual CFO
Key Success Factors	• Prior business experience and ability to apply that experience to a wide range of client situations • Advanced skills in specific industry verticals service by [FIRM NAME] • Ability to motivate and manage staff in a pay-for-performance environment with remote staff • Attention to detail • Ability to meet tight deadlines • Ability to manage unexpected and sometimes urgent firm or client matters as they arise • Expertise using a range of technology solutions (software, peripherals, etc.) • Project management skills • Time management skills • Unrelenting commitment to client satisfaction
Responsibilities	Weekly client telephone meetings with clients relating to ongoing WIP and special projects, Open Items lists Internal Management Summary Report preparation Internal Client Analysis Report preparation for CFO Preparation of complex client Key Performance Indicators (KPIs), Critical Success Factors (CSFs) and other management reports Budgeting and Forecasting project completion (in support of CFO) and completion of Management Report Package Review of Management Reporting Packages prepared by Accounting Manager Client Procedures Manual Pt ongoing monthly maintenance/updates Staff and technology resource planning/management

Key Performance Indicators	• Meets assignment objectives (timeframes, budgets, outcomes) • Client satisfaction • Business development results Pt selling and cross-selling • Team satisfaction • Participation in firm wide initiatives - recruitment, business development, and retention initiatives
Qualifications/ Skills and Experience/ Personal Attributes	• Bachelor's Degree in Accounting with minimum GPA of 3.3 • Active CPA license. MBA preferred • 5-7 years of experience in private/public accounting working with clients in the \$1-\$10 million in revenues per year range. Some experience working with clients with revenues up to \$50 million preferred. • 2-3 years managing staff in a pay-for-performance environment preferred • Strong technology skills using Microsoft Office 2007 or later (Word, Excel, PowerPoint, and Outlook at a minimum, more applications preferred) • Home office environment, including separate work area, PC (minimum system requirements must be met) with Windows 7. Additional technology requirements will be communicated to candidates selected for this position and must be met on an ongoing basis. • Experience working in a paperless environment strongly preferred • Strong interpersonal and relationship building skills • Team player with a positive can-do approach • A general and growing knowledge of firm products and services in the practice area, and a general knowledge of products and services in other practice areas

ROLE: VIRTUAL CFO

Purpose	The Virtual CFO serves as the key Trusted Advisor for accounting and advisory clients of the firm. This position relies heavily on the financial reporting efforts of all reporting staff positions, and is at the same time responsible for the managing and mentoring of the CAS team. The Virtual CFO is responsible for managing budgets within the CAS division and for leading a profitable functional area of the practice - leading the team, building the business and ensuring the team delivers exceptional client service. This role also supports the business development and growth initiatives of the practice and is responsible for retaining talented people through strong leadership and coaching/mentoring relationships.
Reports to/ Accountability	Director of Client Accounting Services
Key Success Factors	• Exceptional client relationship skills • Ability to lead a profitable work team • Business acumen • Business development skills • Selling skills • Leadership and project management skills, including the ability to successfully coach and mentor talented people • Technical expertise and specialization • Industry profile
Responsibilities	• Primary direct relationship with assigned clients Pt meets with each client quarterly at a minimum, monthly in most cases • Private industry experience working in an industry serviced by [FIRM NAME] strongly preferred • Budgeting & forecasting, cash flow and other strategic planning with the client

	• Primary client ally in relationships with client's professional team (attorney, insurance and financial experts, banks, etc.) • Integrated resource and performance planning, solutions implementation, and management with other business areas (marketing & sales, HR, technology) • Individual client budgeting and resource management, ongoing mentoring and supervision • Management of new client implementations and ongoing support in addition to Controller and CAS team
Key Performance Indicators	• Revenue & profitability • Sales of \$XX • Cross-sales \$XX • Client satisfaction • Team satisfaction • Industry profile • Retention of talented senior people
Qualifications/ Skills and Experience/ Personal Attributes	• Bachelor's Degree in Accounting with minimum GPA of 3.3 • Active CPA license. MBA preferred • 7-10 years of experience in private/public accounting working with clients in the \$1-\$10 million in revenues per year range. Some experience working with clients with annual revenues up to \$50 million or more preferred. • 3-5 years managing staff in a pay-for-performance environment preferred • Specialized expertise that would qualify the CFO as an expert in one or more industry verticals • Strong technology skills using Microsoft Office 2007 or later (Word, Excel, PowerPoint, and Outlook at a minimum, more applications preferred) • Home office environment including separate work area, PC (minimum system requirements must be met) with Windows 7. Additional technology requirements will be communicated to candidates selected for this position and must be met on an ongoing basis. • Experience working in a paperless environment strongly preferred • Strong interpersonal and relationship building skills • Team player with a positive can-do approach • A general and growing knowledge of firm products and services in the practice area, and a general knowledge of products and services in other practice areas

ROLE: DIRECTOR OF CLIENT ADVISORY SERVICES

Purpose	The Director of Client Advisory Services is responsible for the management of the day-to-day operations of the Client Advisory Services (CAS) division of the firm. While the Director will have heavy involvement with the firm's A-Level clients and relationships, the majority of the daily role of the Director is an internal function, providing oversight, mentoring and quality control for the CAS team. The Director of CAS is responsible for ensuring the profitability of all client engagements, for recruiting, hiring, managing and retaining top-performing staff, and for reporting to the CAS Partner, as well as other divisions of the firm (in support of the CAS Partner). The Director also owns the responsibility for management of the Client, Employee and Best Practices Advisory Boards of the CAS practice.
Reports to/ Accountability	Partner

Key Success Factors	• Prior business experience and ability to apply that experience to a wide range of client situations • Advanced skills in specific industry verticals service by [FIRM NAME] • Ability to motivate and manage staff in a pay-for-performance environment with remote staff • Attention to detail • Ability to meet tight deadlines • Ability to manage unexpected and sometimes urgent firm or client matters as they arise • Expertise using a range of technology solutions (software, peripherals, etc.) • Project management skills • Time management skills • Unrelenting commitment to client satisfaction
Responsibilities	• Essential \$20,000-foot view of the CAS activities • Heavy contact with firm's A-Level clients and Prospect Development • Budgeting & Forecasting for the CAS Business Group (Internal) • Management of Critical Success Factors (CSFs) & Key Performance Indicators (KPIs) for the Business Group • Overall responsibility for CAS Business Group profitability and client satisfaction • Staffing, Technology and other resource planning/management • Business Group individual and team performance reviews • Education & Development for the Business Group (with team involvement) • New technology recommendations to the Partner(s) (with extensive involvement from the CAS team), implementation strategy and oversight • Team morale, incentives & rewards
Key Performance Indicators	• Meets assignment objectives (timeframes, budgets, outcomes) • Client satisfaction • Business development results Pt selling and cross-selling • Team satisfaction • Participation in firm-wide initiatives - recruitment, business development, and retention initiatives
Qualifications/ Skills and Experience/ Personal Attributes	• Bachelor's Degree in Accounting with minimum GPA of 3.3 • Active CPA license. MBA preferred • 7-9 years of experience in private/public accounting working with clients in the \$1-\$10 million in revenues per year range. Some experience working with clients with revenues up to \$50 million preferred. • 2-3 years managing staff in a pay-for-performance environment preferred • Strong technology skills using Microsoft Office 2007 or later (Word, Excel, PowerPoint, and Outlook at a minimum, more applications preferred) • Home office environment, including separate work area, PC (minimum system requirements must be met) with Windows 7. Additional technology requirements will be communicated to candidates selected for this position and must be met on an ongoing basis. • Experience working in a paperless environment strongly preferred • Strong interpersonal and relationship building skills • Team player with a positive can-do approach • A general and growing knowledge of firm products and services in the practice area, and a general knowledge of products and services in other practice areas

ROLE: PARTNER

Purpose	The Partner role provides leadership for the CAS division and is accountable for quality client service, winning new work, adding value through commercial acumen, and developing high performing teams.
Reports to/ Accountability	Board of Partners/ Managing Partner/ Lead Practice Partner
Key Success Factors	• Business acumen • Selling skills • Leadership and project management skills and an ability to successfully mentor talented people • Technical knowledge and expertise • Functional/industry specialization and profile • Knowledge of firm products and services
Responsibilities	• Leader within the firm and of the CAS Business Group Vision, Culture, and What Success Looks Like for the CAS Group • Partnering with clients by understanding their business and industry and providing ongoing advice, insights and support • Consults and works successfully with other partners and senior managers/directors to ensure seamless integrated services • Manages assignment risks relative to client and firm requirements • Seeks regular client assessment of assignment progress and overall feedback on performance/value add • Challenges and enhances assignment profitability management based on experience and best practice • Identifies and promotes the development of new delivery capabilities and/or channels to satisfy evolving market requirements • Generates leads, contacts and sales • Continually develops industry expertise and profiles the firm • Accountable for the financial performance of an agreed part of or whole practice unit • Leads and mentors key talented people through to partnership
Key Performance Indicators	• Revenue of \$XX and generated sales leads of \$XX within and across disciplines • Client satisfaction • Team satisfaction • Retention of talented senior people and development through to partnership
Qualifications/ Skills and Experience/ Personal Attributes	• Bachelor's Degree in Accounting with minimum GPA of 3.3 • Active CPA license. MBA preferred • At least 10 years of experience in private/public accounting working with clients in the \$1-\$10 million in revenues per year range. Some experience working with clients with annual revenues up to \$50 million or more preferred. • At least 7 years managing staff in a pay-for-performance environment preferred • Specialized expertise that would qualify the Partner as an expert in several industry verticals served by the firm • Demonstrated history of success and client satisfaction • Demonstrated ability to build, lead and retain a high-performance team • Strong technology skills using Microsoft Office 2007 or later (Word, Excel, PowerPoint, and Outlook at a minimum, more applications preferred) • Home office environment, including separate work area, PC (minimum system requirements must be met) with Windows 7. Additional technology requirements will be communicated to candidates selected for this position and must be met on an ongoing basis. • Experience managing a paperless environment strongly preferred

	• Strong business development and selling skills Pt generating leads, making contacts and securing clients • Strong and innovative leadership and project management skills, including the ability to mentor talented people • A thorough understanding of firm products and services in the practice area with a working knowledge of firm products and services in other practice areas • A thorough understanding of market trends, including opportunities, global and local business initiatives and stakeholder/competitor interests
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ROLE: IMPLEMENTATION SPECIALIST

Purpose	The Implementation Specialist role is responsible for managing the onboarding and early-stage support for new clients and for facilitating a smooth transition to the long-term CAS Accounting Team.
Reports to/ Accountability	CFO
Key Success Factors	• Business acumen • Project management skills • Team management skills including an ability to lead, direct and coach • Client relationship skills • Technical knowledge and a developing area of expertise
Responsibilities	• Orchestrates and implements the new client process • Serves as the primary contact and initial combined Outsourced Accountant and Controller during the initial 90 days with a new client before transitioning the work to a CAS Outsourced Accountant, Controller, and possibly an intern for Accounts Payable Processing • Initial setup of 3rd party applications that the firm and the client will use to collaborate for ongoing financial reporting, document processing, etc. • Provides training for new clients and client staff in the use of shared software applications • Provides orientation and training relating to the Service Level Agreement requirements, collaborative workflow, ongoing scheduling of CFO and weekly Accountant meetings, and helps reinforce the importance of client compliance with processing and meeting agreements • Along with Help Desk staff, is responsible for remaining current and fully developed in the use of CAS accounting and integrated applications and for providing supportive ongoing training and development to the CAS team • Telephone, video conference and live consultations with clients to review Internal Management Reports and other information during the implementation period • Develops and strengthens long-term relationships with senior client management and peer client levels • Plans, organizes and controls multiple responsibilities and resources to achieve assignment objectives • Manages the assignment budget and profitability in their area of responsibility • Anticipates and communicates budget issues, identifies opportunities to improve assignment profitability and prepares billings and assists in collections • Identifies client needs/opportunities to sell additional value added services • Identifies cross-selling opportunities and refers them to the appropriate team member • Leverages commercial and market knowledge to anticipate client needs for new/additional services • Development of functional specialization and/or industry expertise • Builds strong coaching skills • Actively pursues self-development opportunities in line with the competency model

Key Performance Indicators	• Meets assignment objectives (timeframes, budgets, outcomes) • Client satisfaction • Business development results Pt selling and cross-selling • Team satisfaction
Qualifications/ Skills and Experience/ Personal Attributes	• Bachelor's Degree in Accounting with a minimum GPA of 3.3 • Prior bookkeeping experience required that involved processing of Accounts Payable, Accounts Receivable and Payroll. Experience preparing payroll and sales tax returns strongly preferred. • Prior experience managing a staff strongly preferred • Strong technology skills using Microsoft Office 2007 or later (Word, Excel, PowerPoint, and Outlook at a minimum, more applications preferred) • Home office environment, including separate work area, PC (minimum system requirements must be met) with Windows 7. Additional technology requirements will be communicated to candidates selected for this position and must be met on an ongoing basis • Experience working in a paperless environment strongly preferred • Strong interpersonal and relationship building skills • Team player with a positive can-do approach • A general and growing knowledge of firm products and services in the practice area, and a general knowledge of products and services in other practice areas

ROLE: CLIENT SUPPORT (HELP DESK) SPECIALIST

Purpose	The Implementation Specialist role is responsible for managing the onboarding and early-stage support for new clients and for facilitating a smooth transition to the long-term CAS Accounting Team.
Reports to/ Accountability	CFO
Key Success Factors	• Business acumen • Project management skills • Team management skills, including an ability to lead, direct and coach • Client relationship skills • Technical knowledge and a developing area of expertise
Responsibilities	• Reviews requests from firm clients for special projects, custom reports, technical training (after the initial implementation period) • Works in cooperation with the CFO and Partner to provide the client with quotes for any Service Order requests, including fees and timing/scheduling, and with sales to confirm that the Service Order and payment have been received prior to beginning work • Provides technical training to the client, facilitates technical support as a liaison with 3rd party solution providers, and helps to resolve any technical support issues • Prepares custom reports as requested by the client in collaboration with the Outsourced Accountant and Controller, including custom report design • Along with Implementation staff, is responsible for remaining current and fully developed in the use of CAS accounting and integrated applications and for providing supportive ongoing training and development to the CAS team • In firms that do not have dedicated in-house sales staff, supports Partners and CFOs by giving demonstrations of technology solutions and services to potential clients or existing clients seeking add-on solutions

	• Plans, organizes and controls multiple responsibilities and resources to achieve assignment objectives • Manages the assignment budget and profitability in their area of responsibility • Anticipates and communicates budget issues, identifies opportunities to improve assignment profitability and prepares billings and assists in collections • Identifies client needs/opportunities to sell additional value-added services • Identifies cross-selling opportunities and refers them to the appropriate team member • Leverages commercial and market knowledge to anticipate client needs for new/additional services • Development of functional specialization and/or industry expertise • Builds strong coaching skills • Actively pursues self-development opportunities in line with the competency model
Key Performance Indicators	• Meets assignment objectives (timeframes, budgets, outcomes) • Client satisfaction • Business development results Pt selling and cross-selling • Team satisfaction
Qualifications/ Skills and Experience/ Personal Attributes	• Bachelor's Degree in Accounting with a minimum GPA of 3.3 • Prior bookkeeping experience required that involved processing of Accounts Payable, Accounts Receivable and Payroll. Experience preparing payroll and sales tax returns strongly preferred. • Prior experience managing a staff strongly preferred • Strong technology skills using Microsoft Office 2007 or later (Word, Excel, PowerPoint, and Outlook at a minimum, more applications preferred) • Home office environment, including separate work area, PC (minimum system requirements must be met) with Windows 7. Additional technology requirements will be communicated to candidates selected for this position and must be met on an ongoing basis. • Experience working in a paperless environment strongly preferred • Strong interpersonal and relationship building skills • Team player with a positive can-do approach • A general and growing knowledge of firm products and services in the practice area, and a general knowledge of products and services in other practice areas

ROLE: DIRECTOR OF MARKETING

Purpose	The Director of Marketing role is responsible for the development of the firm's Marketing Plan through collaboration with the firm's partners and stakeholders. Further, this role is responsible for the implementation of plan activities, the analysis of marketing results, and ongoing public relations.
Reports to/ Accountability	Partners
Key Success Factors	• Business acumen • Project management skills and ability to work independently • Public speaking skills • Prior experience marketing to the firm's target client base • Client relationship skills • Public relations and interpersonal skills
Responsibilities	• Develops marketing plans, budgets, and action plan steps with calendar scheduling • Implements marketing plan action steps, track expenditures, report results of marketing efforts to Partners, Advisory Boards and key staff • Develops action plans, timelines, and marketing materials for firm marketing events, advisory boards, internal firm marketing communications, client seminars, webinars,

	social media, etc.
	• Identifies and researches new marketing opportunities • Develops materials for firm web site and prospecting folders Pt service profiles, brochures, promotional items, writing of cover letters, firm staff profiles, etc. • Writes, formats and edits public newsletters • Writes, formats and edits internal firm newsletter • Helps firm professionals write proposals for product and service sales, updates proposal templates • Writes letters for mass mailings or individual prospect or client contact • Develops/coordinates firm marketing training for professional and support staff throughout the firm • Collects testimonials; assist in writing • Writes news/press releases and articles on the firm and team member accomplishments • Writes articles on accounting subjects for publication (with Partner approval of content) • Surveys or interviews targeted clients each year • Calls or surveys lost clients • Manages the assignment budget and profitability in their area of responsibility • Identifies client needs/opportunities to sell additional value-added services • Identifies cross-selling opportunities and refers them to the appropriate team member • Leverages commercial and market knowledge to anticipate client needs for new/additional services • Development of functional specialization and/or industry expertise • Builds strong coaching skills • Actively pursues self-development opportunities in line with the competency model
Key Performance Indicators	• Meets assignment objectives (timeframes, budgets, outcomes) • Number of leads generated per marketing effort • Value of leads generated per marketing dollar spent
Qualifications/ Skills and Experience/ Personal Attributes	• Degree qualification and relevant professional accreditation • Business acumen • Strong technical knowledge and skills • A developing area in field of expertise and industry profile • Rolodex of media and creative contacts • Strong project management skills • A strong knowledge of firm products and services, with an understanding of the value for the end-user so as to be able to communicate the value successfully to each type of target