

## JOB DESCRIPTION

**Job Title:** Bookkeeper  
**Team:** Business Services

### PURPOSE OF ROLE AND PRIMARY OBJECTIVES

- To provide support to the management of the Business Services provided by the firm
- To take specific responsibility for individual tasks and assignments, ensuring their effective and timely delivery and that the quality of service meets the firm's aims

### REPORTING RELATIONSHIPS

- You will report to Directors, Associates and Managers
- You will report to clients when required and when directed by Directors, Associates and Managers

### AIMS AND VALUES

All members of the firm are responsible individually and collectively for delivering an excellent client experience through our services. This includes:

- Going the 'extra mile' to assist clients
- Treating every client as unique
- Friendly and approachable style
- Being inspirational and energetic
- Professional and ethical conduct
- Knowledge sharing and pro-active approach to team development
- Focusing on business benefits and lasting change
- Being practical
- Being involved but remaining objective

### KEY RESPONSIBILITIES

- Support and promote the aims and values of the firm
- Support relevant change management processes within the Business Services department
- Ensure adequate systems and controls are in place for key service lines
- Represent and promote the firm at firm events, networking and professional referral events
- Regularly reviewing clients' affairs to seek additional selling opportunities

### MAIN DUTIES

- Manage the portfolio to ensure deadlines are met for all Business Services routines
- Ensure appropriate review procedures are carried out for work undertaken in the business services department to ensure technically accurate
- Help to motivate the team members in the department to drive towards delivering the firm's expectation of client experience
- Keep client managers informed on job progress and highlight any problems or delays on a timely basis
- Follow firms reporting procedures for portfolio status

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- Delivery of Business Services key service lines, including:
  - Book-keeping
  - VAT return preparation
  - Preparation of Management Accounts
  - Company Formation services
  - Business start-up services
  - Online accounting
  - Small business accounting & tax compliance
  - CIS returns and filing

## KEY PERFORMANCE INDICATORS

- Personal chargeable hours target
- Department team chargeable hours target
- Department client retention
- Other project targets (as agreed in appraisals)

## QUALIFICATIONS / SKILLS AND EXPERIENCE

- Up-to-date and appropriate knowledge and skills in your technical field to enable you to fulfil the purpose of your role.
- Computer skills appropriate to your role
- Verbal and written communication skills appropriate to your role

## KEY SKILLS AND ATTRIBUTES

All Team Members are expected to demonstrate a consistent and comprehensive application of the following behaviours:

**Personal Effectiveness** - Working in an organised, effective and influential manner in order to achieve the required results within acceptable timescales

**Commercial Awareness** - Focussing on current and likely benefits to the business in all aspects of work, achieving outcomes in a cost effective manner

**Client Focus** - Ensuring that every effort is made to consistently provide a standard of service to meet and where possible exceed the expectations of both internal and external customers

**Change and Innovation** - Seeking and persuading others about opportunities for change and reacting to change suggested by others in a helpful and supportive manner

**Teamwork** - Working together effectively with others to achieve more than could feasibly be achieved individually

**Managing and Developing Others** - Providing management and support for employees from recruitment onwards so that each and every person is motivated to contribute to their full potential and is meeting or working towards the required standards of performance

**Communication** - Making the effort to communicate with others in an appropriate, thoughtful and timely manner

**Professional and Technical** - Possessing and putting to good use all the technical and specialist skills required to carry out the role efficiently