

Job Title: Practice Administrator

Location: 72 West Street, Portchester, near Fareham, PO16 9UN (office-based).

Company: D V Marlow & Co Limited (www.dvm.co.uk).

Job Type: Full-Time/Permanent

Salary: Negotiable (dependent on experience)

Benefits:

- Small, friendly team
- Possible progression to combined admin / bookkeeping role
- Free car parking
- High-street location
- Free tea and coffee, and use of kitchen facilities

About Us:

D V Marlow & Co is a dynamic, family-run accountancy practice dedicated to providing exceptional service to our clients.

Our friendly team offers high-quality, professional accounting and taxation services to a range of clients. We support a variety of businesses from individuals and solopreneurs to large businesses with a turnover of several million.

We work as a trusted partner to make clients' lives easier, allowing them to realise their full potential and reach their financial goals.

We're looking for a motivated and skilled Practice Administrator to join our team. The ideal candidate will be proactive, detail-oriented, and possess excellent organisational skills!

We pride ourselves on our supportive family values, so full training and a thorough induction will be provided.

Ideal Candidate Traits:

- Welcoming and friendly demeanour.
- Excellent customer-service skills.

- Confident communicator.
- Takes instructions well and executes tasks efficiently.
- Proactive and demonstrates great initiative.
- Quick learner with a positive attitude.
- Demonstrates high levels of accuracy and attention to detail.
- Highly organised and responsible.
- Trustworthy and reliable.

Technical Skills / Experience:

Essential:

- IT literate, with strong skills in Excel
- Proficiency in using CRM software.
- Customer service experience, including excellent telephone manner.
- Ability to accurately follow established procedures and suggest improvements.
- Ability to learn new systems and procedures quickly and effectively.

Desirable:

- Experience in using accounting systems such as QBO / Xero.
- Experience in database management.
- Experience working in an accounting or other professional services firm a bonus.

Key Duties / Responsibilities:

- General reception desk duties such as answering telephones, dealing with daily administrative tasks, greeting clients, and maintaining a positive and welcoming attitude towards clients and colleagues throughout.
- Fielding enquiries from clients and prospective clients, via email, telephone, or web form, providing exceptional customer service, and ensuring client satisfaction.
- Organising and managing administrative tasks (both regular and stand-alone), and related diary management, to ensure smooth running of the office.
- Learning about and using the firm's practice management (CRM) system accurately and efficiently.
- Managing new client onboarding, and maintaining existing client records in various systems, with a high degree of attention to detail.
- Scanning client records, and using receipt-capture software efficiently to prepare work for the bookkeeping team.
- Managing client billing (regular and ad-hoc), liaising with Client Managers.
- Assistance with maintaining the firm's own bookkeeping records by entering invoices into software accurately.
- Assistance with the firm's monthly credit control process (including contacting clients with gentle reminders), and setting up customer direct debit payments.
- Demonstrating proactive behaviour and taking initiative in making suggestions for improvements in systems and procedures.
- Handling tasks with a high degree of trustworthiness and reliability, including banking.

Preferred Qualifications:

- Experience and / or qualification in Microsoft Excel and Word is essential.
- Possession of a valid driving license is preferred.

How to Apply:

If you are ready to take on the challenge and feel you meet the requirements and qualifications listed above, please send your CV and a covering letter detailing your relevant experience, and why you would be a great fit for our team to: jennifer@dvm.co.uk

Application Deadline: Friday 21 June 2024 (although we may close the position sooner if the right candidate has been found).

Start date: To ensure a handover from our current Practice Administrator who is retiring, our ideal start date is **Thursday 1 August**. However, this is flexible according to mutual requirements.

D V Marlow & Co is an equal opportunity employer. We celebrate diversity and are committed to creating an inclusive environment for all employees.

Join us at D V Marlow & Co and be a part of a team that values excellence, initiative, and a positive work environment. We look forward to receiving your application!