

Title: Client Services Coordinator

Reports to: Client Services Manager

---

### **Organisation Strategy**

#### **Our Clients**

Johnsons MME is in the business of focusing on the complete development of our clients.

This encompasses both client life goals and aspirations, together with their business and financial goals and aspirations.

#### **Our People**

Johnsons MME is in the business of focusing on the complete development of our people.

This encompasses their life goals and aspirations along with their career goals and aspirations.

#### **Our Suppliers**

Johnsons MME acknowledge that our suppliers are a vital part of our business success. Suppliers are treated with respect with clear instruction given as to the goods or services to be acquired and supplier terms negotiated and honoured.

#### **Our Mission**

Achieving Goals Together

---

### **Position Outline**

The Client Services Team works closely with the accounting staff across the Firm, providing administrative support in a range of accounting related matters for clients. It is critical that the Client Services team communicates with the accounting staff on the status of work and job progress. The ability to meet deadlines is essential in this role.

#### **Stakeholders:**

Internal: Directors, Managers, Client Services Team, Corporate Services Team, Accounting Staff

External: Clients of Johnsons MME, Banking Relationships, Australian Tax Office, Service NSW, Service Victoria, Centrelink

Description: The main function of the position is to coordinate the workflow operations. This will include liaising with all staff members in the Business Services Team including Business Services Managers and Directors to assist them in meeting client expectations and deadlines

**Key Responsibilities:*****Day to Day Operations***

- Providing administrative support and assist with coordinating client workflows
- Liaise with clients to ensure accurate and timely information is received and provided
- Support the Business Services Directors and Managers with coordination of client queries
- Maintain workflow and client management systems
- Prepare correspondence and communication for clients
- Assist with reception duties as required

***Monitoring***

- Monitor Monday.com to assist Business Services Managers and Directors to keep client work moving
- Monitor Work In Progress (WIP) and billing data to ensure all completed assignments are billed in a timely manner

***Business Results & Improvements***

- Continuously look for ways to improve systems and processes to enhance the way the Client Services Team delivers its services
- Implement Best Practice standards in all areas of work

***Risk Management***

- Identify items at risk of not meeting client expectations or deadlines
- Ensure compliance with quality control policies and procedures

**Personal Attributes:**

- Present a professional image to clients and external organisations, whether by telephone, correspondence, email or in person
- Work cooperatively as proactive team members
- Communicate effectively with a proactive and collaborative approach
- Manage own workflows to ensure deadlines and client expectations are met
- Behave in a manner that provides others with a role model in all aspects of presentation and conduct