

## Position Description

Organisation name:	Sheridan Partners
Position title:	Receptionist/Administration Officer
Reports to:	Directors and Sheridan Partners or delegated Authority
Position summary:	<p>Provide outstanding client service with the provision of quality, timely and cost effective reception, administration and support services. Key tasks include responsibility for reception and general administration duties. The reception team are the face of our business and are expected to demonstrate exceptional customer care and service qualities.</p> <p>You will provide a wide range of administrative duties and other related functions in the office and provide support to the staff and management on a day-to-day basis.</p>
Employment status	Part Time/Full Time
Hours:	30-37.5 hours per week
Location:	Kyabram
Performance review period:	3 month trial period, Interim review in six months and Full Review in 12 months

Responsibility area	Key tasks/activities	Performance indicators
Reception and Administration	Collation & finalisation of client files for accountants & client managers.	<i>Ability to finalise files for presentation to the client including: Printing, Highlight Statements, Pdfing/Binding &amp; Electronic signing to clients.</i>
	Develop working knowledge of the organisation's services, systems and processes and is able to apply them with support and direction.	<i>Your own skills and professional development are effective in managing client queries and requirements.</i>
	Co-ordinate administrative duties and prioritise tasks to balance competing demands and client needs.	<i>Plans, co-ordinates and delivers quality service on time. Seeks regular feedback on performance from management.</i>
	Answer and respond to all incoming phone calls. Look after all visitors and clients who come into the reception area, including organising refreshments.	<i>Greets clients in a professional and friendly manner. Maintains reception area, interview rooms and front office so they are clean and organised at all times.</i>
	Maintain the mail in and mail out tasks, including typing letters.	<i>All correspondence is dealt with in line with the procedures of the organisation.</i>
	Prepare and co-ordinate the daily banking.	<i>Accurate preparation of banking transactions. Secure and timely deposits to bank.</i>
Team work	Encourage and promote team work with all staff. Work as an effective team member sharing information and providing peers with assistance.	<i>Fellow team members are cooperative and supportive of their own team and the business generally.</i>
	Exhibit and promote commitment, staff development and ethics within the firm.	<i>Personal behaviours regarding commitment, ethics and professional development are seen as the norm.</i>
	Be committed to the firm's future development and support of staff members' career and personal development.	<i>Future development plans and initiatives are supported.</i>
	Foster friendship, high morale and consideration within the business.	<i>You are perceived as friendly and approachable. You are cheerful within the work environment.</i>
	Provide ongoing support to the staff and management.	<i>Management and staff can rely on you for support and commitment.</i>
	Encourage a positive learning and professional development work environment.	<i>You and your team members support all internal training initiatives.</i>

	Communicate effectively with all staff, clients and management.	<i>Communications are received and interpreted correctly.</i>
Promotion	To promote the interests of the business to the general community and enhance the organisation's goodwill. To represent and promote the business within the wider community.	<i>Clients and the general public see you as representing the business in a positive way.</i>
Training and coaching	Assist in the creation of opportunities for fellow team members	<i>Work is delegated and assigned with the correct levels of authority and training allowing for effective career development.</i>
	Actively participate in the performance review process by identifying your requirements with regard to personal and professional development and provide opportunities to develop new or optimise existing skills.	<i>Performance review process is actively undertaken to the satisfaction of both staff member and manager.</i>
Operational style, integrity and ethics	Be committed to the best interests of the business as evidenced by your behaviour.	<i>All activities and undertakings are performed at the highest standards without compromise.</i>
	Adopt a supportive operational style in line with the organisation's values.	<i>You understand and can articulate the organisation's vision and strategies and how you contribute to them.</i>
	You will display integrity and ethics consistent with your role within the business.	<i>All regulatory, legislative and compliance requirements are observed and maintained.</i>
	Actively participate as a member of the team by undertaking all duties enthusiastically and cheerfully, maintaining a positive working relationship with management, staff and clients.	<i>Staff morale is maintained at a high level and initiatives are supported in a positive way. You are perceived as friendly and approachable. You are cheerful within the work environment.</i>
General	To actively manage your own performance by using time management skills, initiative and common sense.	<i>Maintain the efficient operations for all administrative tasks and processes in line with performance.</i>
	To cooperate in a professional manner with all clients, staff and management to achieve a harmonious and productive work environment.	<i>Undertake any other duties allocated willingly so you are perceived as approachable and helpful.</i>
	Be committed to the quality improvement process by participating in initiatives and making suggestions as to improvements and/or efficiencies.	<i>You are perceived by peers as being proactive, constructively critical and committed to the philosophy of continuous improvement.</i>

	Communicate accurately, succinctly and in a manner, which promotes a client service orientation.	<i>All people, both internal and external who communicate with you perceive that they have received a clear message, which is accurate and delivered in a friendly helpful manner. All people you communicate with perceive that they have been listened to, that their message has value and, feedback on action taken (or not taken) is provided.</i>
	Provide coaching, orientation and training of new and less experienced staff as requested.	<i>You are perceived as someone who can be approached for coaching, direction and job support. You will provide effective coaching yourself or you will refer the other person to someone acknowledged as more appropriate given the current circumstances.</i>

#### Authority levels

To review and recommend improvements to the following areas:

- Reception procedures
- Administrative tasks and procedures
- General improvements

#### Competency profile

##### Essential

##### Desirable

**The specific competencies, knowledge, qualifications, training and experience that are required to fill this role.**

Knowledge	<ul style="list-style-type: none"> <li>▪ General knowledge of most administrative procedures.</li> <li>▪ Great customer service and phone communication.</li> <li>▪ General legislative and regulatory requirements as they pertain to this role.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Knowledge of accounting</li> </ul>
Practical	<ul style="list-style-type: none"> <li>▪ Communication skills</li> <li>▪ Able to provide exceptional customer service.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Supervision and leadership skills</li> <li>▪ Coaching skills</li> </ul>
Computer	<ul style="list-style-type: none"> <li>▪ Adequate keyboard skills to enable efficient data entry</li> <li>▪ Microsoft Office including Word, Excel, Outlook, Internet Browsers</li> </ul>	<ul style="list-style-type: none"> <li>▪ Microsoft Office including PowerPoint, Access and Visio</li> <li>▪ Other accounting packages used by Sheridan Partners</li> </ul>
Training and experience	<ul style="list-style-type: none"> <li>▪ Level 1 – Entry level school leaver</li> <li>▪ Level 2 – Certificate III Business Administration</li> </ul>	

Key Performance Measurements	
Area	Performance Expectation
Mail	<ul style="list-style-type: none"> <li>▪ All mail is produced accurately and in a timely manner.</li> </ul>
Reception	<ul style="list-style-type: none"> <li>▪ The reception area and meeting rooms are clean and tidy and kept ready for use.</li> </ul>
General	<ul style="list-style-type: none"> <li>▪ Positive feedback is received by clients.</li> </ul>