

Position Description – Senior Production Manager

SPM Name: [Insert name]

Company:	Magnus Business Advisors and Accountants	Salary:	100,000-140,000 PHP / Month
Position:	Senior Production Manager 5-10 Years of Experience	Office Hours	8:30 AM – 5:00 PM (Brisbane Time) 1Hr either side without authorisation
Location:	Work from home	Reporting to:	Senior Client Manager: Katie Walters

Firm Description:

We are a dedicated team of professionals looking to implement the best systems and processes to ultimately provide great outcomes for our clients and their businesses. We operate using extensive processes and procedures to establish best practices and provide a high-quality result on an ongoing basis regardless of which team member is completing the work.

Vision:

To provide our clients with a custodian of the family's wealth.

- Pay only tax which is due by law
- Provide pathways to better wealth accumulation via wise advice
- Protect assets, particularly for unexpected events
- Provide business and estate succession options

Mission:

To provide high-quality outcomes for all stakeholders, particularly clients through the best possible client experience.

Values:

- We will always act with integrity and to the highest standards of the profession above all else.
- We will work together with clients to create excellent partnerships.
- We will respect all stakeholders as individuals and observe tenets of fairness in our dealings.
- We will challenge the status quo and pursue the best outcomes.
- We give and expect honesty in all of our dealings.
- We:
 - Are a business rather than an accounting practice
 - Are focused on quality outcomes and customer experience
 - Prefer fixed price agreements
 - Provide coverage of business issues rather than just compliance (filling in tax forms)
 - Are proactive (Identify and prevent issues rather than deal with them after they occur)
 - Systems oriented (We work from Standard Operating Procedures (SOP) to provide consistent quality results)
 - Dedicated to breaking the “glass ceiling”
 - Holistic approach – looking at the client’s personal goals and how they relate to business.
- Risk management is oriented especially around asset protection.
- Our ideal client understands the value that a great adviser can add to their business.

Our Culture:

No blame culture, we are all human and humans make mistakes so when you identify a mistake:

- Own up to it or discuss it directly with the person who made the mistake (no communication triangles)
- Identify the cause and how to stop it from happening again
- Implement corrections to the procedure to fix the problem and test that the corrections work

We are outcome focused and do not mind having some fun provided the results for the clients are achieved.

Our Service Standards:

Clear client communication is a top priority whereby we under promise and over-provide. From this, we expect that this will help to manage client expectations and leads to less stress for our team and better results for our clients.

Ideal Team Structure:

Team Structure - Role - Available – Graduate / Intermediate Accountant



Senior Production Manager

Leadership Roles and Responsibilities:

- ✓ Your major role will be to support your Senior Client Manager in getting the work completed.
- ✓ You will help the less experienced and less qualified team members in completing their tasks and jobs.
- ✓ You will train and review the work handed to you by your direct reports.
- ✓ You will train and develop the technical skills of your direct reports helping and teaching them with all aspects of financial statement preparation, tax return preparation, bookkeeping and payroll processing.
- ✓ The role includes helping, supporting and training the Client Manager with all technical knowledge requirements.
- ✓ Your team will most likely include Senior accountants, Intermediate Accountants, Graduate Accountants, Senior Bookkeepers, Intermediate Bookkeepers and Junior Bookkeepers.
- ✓ The position requires you to report to the Senior Client Manager.
- ✓ Your role is to review your team's work and ensure it for quality and have tasks and jobs done to a 90% to 100% completion stage for the Senior Client Manager.
- ✓ In this regard, you will have the ability to complete jobs for the Senior Client Manager and hand them to the Senior Client Manager on a golden platter.
- ✓ You will be task-driven but also have the ability to work with other accountants and bookkeepers, helping and guiding them technically.
- ✓ You will not be required to see clients face to face, but occasionally you will be asked to help your client manager with:
 - o strategic client meetings
 - o client software selection
 - o business mentoring
 - o strategic tax planning and structuring advice

Team Work:

- ✓ Training and helping other Accountants and Bookkeepers on your team both in Australia and in our Philippines office.

Soft skills:

- ✓ You are not required to have a high level of interpersonal or selling skills in this role. However, you will need to manage a team of accountants and bookkeepers processing work.

Technical Requirements:

- ✓ The successful applicant needs a very high level of technical knowledge and an ability to apply it to finalise Jobs for the Senior client manager.
- ✓ The CPA or CA qualification is desirable but not a necessity.
- ✓ Preparing Individual Income Tax Returns with and without Rental Properties
- ✓ Preparing Income Tax Variations
- ✓ Preparing Tax Planning Figures and Analysis
- ✓ Preparing Fringe Benefits income tax returns
- ✓ Preparing Financial Statements for:
 - o Sole Traders
 - o Partnerships
 - o Trusts
 - o Companies
 - o Self-Managed Superannuation Funds

Preparing Income Tax Returns for:

- o Sole Traders
- o Partnerships
- o Trusts
- o Companies
- o Self-Managed Superannuation Funds

Use of the following software

- o QuickBooks
- o MYOB Accounting
- o Xero Accounting (90% of Clients are on Xero)
- o Xero Practice Manager
- o Microsoft Products (Teams, Outlook, Excel, PowerPoint and Word)
- o Class Super
- o Now Infinity
- o Practice Protect
- o Google Sites
- o Ignition

Detailed Technical Knowledge Requirements:

- o Non-commercial loss rules
- o Division 7A loans
- o Individual Tax claims
- o Small Business advice – WorkCover, Stamp Duty, Payroll tax, FBT etc
- o Non-Small Business advice
- o CGT SBE Business Concessions
- o Depreciation rules
- o CGT Calculation on Sale of Property
- o SGC Obligations
- o Franking Accounts and the dividend imputation system
- o Family Trust Elections
- o Taxable Payments Annual Reports (TPAR)
- o Tax minimisation strategies

Accountabilities:

Senior Production Manager – Monthly Performance Review and 360 Feedback

 **TINYpulse - Performance Feedback System.**

Each month you will speak with your client manager face to face (via Teams) and you will both rate the below core accountabilities:

Team Workflow Management	Reviewing Work	Productivity % Chargeable hours
Internal Responsiveness to Emails & Phone Calls	Plan work & Goals Ahead	Cooperation with Team Members
Positive & Enthusiastic Attitude – solutions focused	Reliability – on time to work	Feedback to the Client Manager
Your Tiny Pulse Rating by your direct reports	Clients – Returning Client's Calls and Emails	Quality of Working Papers
Following Procedures and systems	Ability to deal with complex issues	Preparing jobs to Budget/Timeframe

Professional Development:

- ✓ It is recommended the Senior Production Manager stay abreast of new technologies and taxation laws.
- ✓ Attendance to CPA\CA\NTAA\Knowledge Shop Tax and Tax Planning workshops is highly recommended.
- ✓ Any CPD hours also need to be met.