

## POSITION DESCRIPTION

<b>Position</b>	<b>Practice Consultant</b>
Reporting to	Consulting Manager – Australia
Direct Reports	Nil
Location	<b>Brisbane:</b> Home office, travel required within Australia, and sometimes New Zealand.
Date	August 2008

### ***Functional relationships (internal/external)***

Internal	<ul style="list-style-type: none"><li>• Regional Managers</li><li>• Product Manager – Practice</li><li>• Sales Team</li></ul>
External	<ul style="list-style-type: none"><li>• Existing and Prospective Clients</li></ul>

### ***Working relationships - most frequent contacts***

Prospective Practices	<ul style="list-style-type: none"><li>• Pre sales discussions/meetings to meet sales targets.</li></ul>
Existing Practices	<ul style="list-style-type: none"><li>• Provision of after sales service, support and training.</li></ul>
Regional Managers	<ul style="list-style-type: none"><li>• Sharing information, agreeing strategy and tactics, day to day advice and review.</li></ul>
Product Manager – Practice	<ul style="list-style-type: none"><li>• Internal training and support provided</li><li>• Client suggestions and feedback provided to the Product Manager and/or Training team as appropriate.</li></ul>

### **Primary objectives**

- Practice Consultants work closely with the Regional Managers of a particular region with the overall aim of fostering the short and long term growth of the BankLink business.
- This includes the acquisition of new practices to become active clients of the BankLink service, as well as facilitating the growth of accounts from existing practices.
- Practice Consultants are particularly focused on the delivery of post-sales assistance to practices new to BankLink, as well as existing clients.
- Delivery of seminars to existing and prospective clients including assistance with content.

*It is expected that all individuals will demonstrate flexibility in regard to completion of tasks. We also expect our people use their specialist knowledge and expertise and provide input where needed to best support the current needs of the business.*

### **Prescribed Hours / Travel**

- This is a full-time client facing role, and the Practice Consultant must therefore be reasonably flexible in terms of working hours which average 40-45 hours per week.
- BankLink will generally only agree to provide services within the hours of 8.00am – 6.00pm, Monday to Friday. Wherever possible and reasonable, travel should be conducted outside of these times so as to maximise time available for the delivery of services.
- Flexibility to travel on a frequent basis within Australia and sometimes New Zealand is essential.
- Own transport is essential.

### **Key responsibilities**

#### **1. Implementation at New Practices**

Ensuring new practices activate as quickly and as expansively as possible through:

- Organisation and delivery of implementation visits for practices new to BankLink.
- Training practice staff so they understand the benefits of BankLink, and are able to use BankLink to greatest effect.
- Agreeing and managing a project and communication plan in consultation with each practice.
- Ensuring the BankLink system is correctly installed and fully functional within the practice.

## **2. Training at Existing Practices**

Ensuring existing practices maximise their usage of BankLink through:

- Organisation and delivery of general product training sessions for existing clients that meets both the objective identified during training needs analysis, and that will foster growth in the use of BankLink.
- Training practice staff so they understand the benefits of BankLink, and are able to use BankLink to greatest effect.
- Undertake administrative tasks, including recording enhancement requests and providing training feedback reports to the sales team.
- Ensure training evaluation surveys are completed at the end of each training session.
- Ensuring the BankLink system is correctly installed and fully functional within the practice.

## **3. Promoting BANKLINK generally**

Maximising the market understanding of the benefits of BankLink through:

- Representing BankLink at various industry and other events.
- Clearly and concisely communicating the benefits of BankLink solutions.
- Providing suggestions and input into improvements in processes, procedures, BankLink software and internal production systems. To BankLink, better ways to sell to and serve our clients, including improving training methodologies, and to clients; better ways to operate – how to manage their practice more effectively and profitably, and address any issues they may be having.
- Delivering seminars and presenting to existing and prospective clients, including assistance with content of same.
- Ensuring client satisfaction and a positive outcome for prospects, feedback and client information for existing clients.

### **Key performance objectives**

*These will be mutually agreed on an annual basis. Objectives will link with and support achievement of BankLink goals.*

### **Key performance indicators**

- Adherence to defined sales and training processes, systems and delivery.
- Being responsive to training requirements and ensure completion of post training surveys.
- Working in close consultation with the relevant Regional Manager(s).
- Individual meetings with accounting practices and necessary follow up to such meetings.
- Active participation in seminar design and delivery.
- Manage internal and external relationships and be responsive to client needs.
- Contribution to marketing and promotional activities conducted.
- Participation in relevant internal meetings.
- Provision of regular reporting as required.

**Person specification**

<b>Skills, Knowledge, Experience, Attributes</b>	<b>Essential</b>	<b>Preferred</b>
<b>Education / Qualifications</b>	<ul style="list-style-type: none"> <li>▪ Understanding of adult education and training.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Relevant tertiary qualification.</li> <li>▪ Accounting qualification.</li> </ul>
<b>Experience / Knowledge / Achievements</b>	<ul style="list-style-type: none"> <li>▪ Customer service.</li> <li>▪ Basic accounting concepts.</li> <li>▪ End-user training/training consultancy (ideally within the accounting or banking industry).</li> <li>▪ Effective and experienced communicator (presenting and training).</li> <li>▪ Training individuals and groups in a business setting.</li> <li>▪ Implementation of software solutions for multiple sites.</li> <li>▪ Project management/co-ordination experience.</li> </ul>	<ul style="list-style-type: none"> <li>▪ BankLink software.</li> <li>▪ Account management.</li> <li>▪ Chartered Accountant / or worked in a Public Practice.</li> <li>▪ Familiarity with accounting technology.</li> <li>▪ Consulting services / or BA experience for the sale and implementation of IT based solutions/professional services.</li> </ul>
<b>Specific Skills</b>	<ul style="list-style-type: none"> <li>▪ Excellent interpersonal skills</li> <li>▪ Presentation skills</li> <li>▪ Good time management and attention to detail.</li> <li>▪ Methodical and organised.</li> <li>▪ Problem solving.</li> <li>▪ Relationship building.</li> <li>▪ Able to articulate information to key stakeholders/make recommendations.</li> <li>▪ Due diligence (ie. analyse information, consider, assess industry trends and client needs).</li> </ul>	
<b>Personal Qualities</b>	<ul style="list-style-type: none"> <li>▪ Presents professional image.</li> <li>▪ Ability to influence or change mindset/behaviour.</li> <li>▪ Self-motivated and goal oriented.</li> <li>▪ Builds rapport and trust</li> <li>▪ Quick learner</li> <li>▪ Consultative</li> <li>▪ Good listener</li> <li>▪ Friendly and approachable</li> <li>▪ Courteous under pressure</li> <li>▪ Flexible and reliable</li> <li>▪ People person.</li> </ul>	

<b>Technical Ability</b>	<ul style="list-style-type: none"> <li>▪ Computer literacy in MS Office product suite.</li> <li>▪ Competence in PC Desktop applications use and set-up.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Exposure/familiarity with network configuration (eg. servers/workstation set-up).</li> <li>▪ Some familiarity with relational databases (eg. SQL) – may be able to execute queries.</li> </ul> <p>NB: Training will also be provided.</p>
<b>Other Requirements</b>	<ul style="list-style-type: none"> <li>▪ Flexibility to travel within Australia and New Zealand (primarily Australia).</li> <li>▪ Current Drivers License.</li> <li>▪ Own transport.</li> </ul>	

*This job description has been developed to provide you with an outline of what is expected from you in your role. It is expected that over time the position may evolve and the description will be reviewed.*

*At times you will be required to take on additional responsibilities for the business or for your continued self-development. If the position is to change significantly this will be discussed in full with you.*

**Signed by:**

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**Employee:**

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**Manager:**

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**Date:**

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