Class

Position Description

Job title: Consultant

Reports to: Consulting Manager

Positions reporting to this role: Nil

Role

Provide technical and management consulting services to Class users with the implementation and rollout of Class within their organisation and with the rollout of Class functionality to their related parties including planners, investors and auditors. Provide training and customer success activities to Class users ensuring they use Class efficiently and obtain value from using Class products.

Responsibilities

Consulting

- Build trust, communicate effectively and drive engagement with the customer.
- Communicate value proposition of using the Class system and following the Class implementation process to customers.
- Follow plan, execute and track activities against an agreed implementation plan and ensure that customers are fully implementing the Class system in their business and embracing the change management required within their operations.
- Assist the customer through the “first 60/90 day” implementation plan including planning for user access, training, fund transitions, data feed activations, business policy settings and training.
- Conduct spot reviews of the customer’s funds, training attendance and user activity to ensure the customer is optimising the system capabilities.
- Provide direction to accountants and administrators with the timely collation of data and documentation required for transitioning theirs funds.
- Drive engagement with and to meet process milestones incl. contractual agreements.
- Help customers with business related queries and the resolution of day to day issues in adopting the Class software and keeping support ticketing system up to date.
- Troubleshoot and solve problems, assist customers with raising, tracking and escalating support issues identified during the implementation process.
- Deliver training (one-on-one /group) and technical support. This may include on-site meetings where applicable.
- At key milestones, prior to hand-over to Support, perform telephone interviews with the customers to get feedback on the on-boarding experiences including transitions, account management, training and support services.

Class

Implementation Planning and Continuous Process Improvement

- Provide consulting support to customers across the entire on-boarding process:
    - trialling, contract issuing and the “first 60/90 days” of a new implementation
- Ensure the CRM is updated and ensure process check-points and statuses are completed by the appropriate party at each stage of the on-boarding process.
- Gather information to define Best practises and assist customers in adopting best practise principles for administration on the Class applications.
- Update and refine the Implementation Plan to ensure that it continues to provide a roadmap for the success of new customer implementations including areas such as system configuration, user access setup, user training, transitions etc.
- Proactively establish and maintain effective working team relationships with Sales, Product Management and other areas of the business.

Account Management Assistance

- Provide the respective RCM (Regional Client Manager) with ongoing updates as to the customers’ progress during implementation.
- Identify customers at risk of not implementing successfully and engage the customer’s RCM in resolution and case management.
- Follow plan, execute and track activities against an agreed Customer Success and ensure that customers are fully implementing the Class system in their business and extracting value for their business.

Product and Sales/Marketing Support

- Liaise with product manager and key stakeholders on customer requirements and enhancements related to the entire on-boarding process
- Work with Transitions Team to capture and compile Implementation ‘most wanted items’.
- Assist the product team in developing a communication plan to advocate best practise.
- Assist the sales team in pre-sales technical session, demos and trials when required
- In conjunction with Sales, Marketing and Product Management teams, participate in periodic road shows and conferences to Class customers in major centres, providing technical product updates/ best practise demonstrations.

Key Performance Indicators

- Colleague satisfaction as assessed by your manager, peers and associated project and support staff – note this assessment may be performed either informally by interview or formally via survey subject to the applicable management processes in place at that time.

  The assessment will include:
    - How effectively you execute the above responsibilities (includes pro-activeness, responsiveness and thoroughness) and
    - how professionally you interact and communicate with your colleagues (and customers if applicable)
- Customer satisfaction as assessed by your consulting customers and via a company-wide customer survey performed by the business annually.

Academic & trades qualifications

Formal degree qualifications in the area of Accounting required.

Work Experience and Skills

Essential

- Strong communication skills
- Past experience in working in an accounting practice
- Ability to work in a fast-paced environment.
- Excellent written and oral communication skills

Desirable

- Knowledge of Australian Superannuation legislation and practice
- Exposure to the software development cycle using an Agile approach
- Knowledge of Class or other SMSF administration systems
- Experience working in Business Services and/or Tax Accounting

Personal qualities & behavioural traits

- Project and process orientated
- Ability to work to deadlines
- Ability to troubleshoot issues and determine resolutions to complex issues and then communicate those resolutions to clients, team members, other staff members and other stakeholders
- Ability to share knowledge & work in a team orientated environment

Conditions

- Monthly salary commensurate with industry knowledge, experience and skills
- 38 hour working week with some degree of flexibility in starting and finishing times
- Sydney based