



JOB DESCRIPTION

Job Title: Advisory Projects Manager

Full / part time: Full Time

Inspire:

Inspire is an award winning advisory firm focused on enabling entrepreneurs to succeed. We are a firm of talented, passionate and caring professionals committed to supporting our clients. A unique and energetic firm based in Poole, with clients across the South Coast, Inspire represents a truly different place to work.

In joining Inspire's Advisory Projects team you would be part of a successful team which has delivered many Corporate Finance and Tax Advisory projects over the years making a real difference to our clients. You will work closely with all members of the wider Inspire team and support our entrepreneurial clients in a variety of projects.

Job Purpose:

Your role will be to manage workflow, oversee advisory projects and manage the team, reporting to the Directors.

You will be a commercially minded individual capable of managing a wide range of advisory projects and guiding and advising clients throughout.

You will have experience of delivering a wide range of projects, will be able to share your experiences and bring this experience to bear in delivering assignments.

You will be organised, a good manager of people and be able to see ways to continue the development of Inspire's advisory offering and guide our clients towards determining their strategic goals.

You will be expected to deliver exceptional client service, require excellent attention to detail, be able to remain calm under pressure and capable of thinking on your feet. You will be a team player, able to deliver projects working with a wide range of Inspire team members and coordinating our clients and other professional advisors.

You will have line management experience and be able to coordinate a team to deliver assignments.

Principal Duties and Responsibilities:

Project delivery

- Deliver a wide range of business and tax advisory projects.
- Lead projects and assignments.
- Co-ordinate projects and assignments, especially where the project or assignment requires input from other Inspire teams.
- Keep up to date with relevant business news.
- Responsible for preparing the weekly projects list and ensuring the efficient and timely completion of projects.

- Carry out background research and present findings
- Preparation of reports, presentations and correspondence
- Maintain databases and filing systems
- Prepare and review forecasts using Sage Forecasting and Excel
- Prepare and review research of company targets for acquisitions or disposals using Fame/Zephyr and other sources.
- Prepare and review documentation for applications for funding.
- Attend and contribute at Strategic Review meetings and prepare subsequent presentation.
- Coordinate and manage a variety of tax advisory projects
- Keep other members of the Inspire team informed of progress.
- Contribute to discussions on how to improve processes
- Willing to work extra hours at times to complete assignments on time
- Work with Associate Director & Director to ensure risks are managed

Business development, networking and relationships

- Preparing draft proposals for new clients.
- Preparing draft quotes for existing clients.
- Attend networking events – both run by Inspire and others
- Attend networking events and meetings with key business contacts to strengthen the firm's distribution strategy and foster good working relationships with contacts within banks and law firms who also work with our existing and potential client base.
- Building & developing client relationships. Attend meetings with clients and their other professional advisers (Banks, Lawyers) as and when required.

Administration

- Responsible for the month end billing process.
- Responsible for updating the pipeline and billing spreadsheets.
- Arranging monthly catch ups with team members
- Motivate and encourage other members of staff to ensure they are reaching their potential.
- Ensuring professional development is carried out by seeking out training opportunities for the Business advisory team.
- First review of junior team members work.

This role requires someone who has a full driving licence and their own transport, this is essential.

CANDIDATES WILL BE EXPECTED TO PREPARE A PRESENTATION / CASE STUDY AS PART OF THE INTERVIEW PROCESS. MORE DETAILS TO BE PROVIDED.