



Job Description

Pack Member Profile: Client Manager

As a Client Manager at Lion Chaser Development Group, you will play a pivotal role in ensuring exceptional client satisfaction by effectively managing client interactions, financial activities, and providing crucial support to the pack. You will embody our core values of Innovation, Accountability, Collaboration, Courage, Entrepreneurial Spirit, Pursuit of Excellence, and Tenacity while guiding the pack to deliver outstanding client service.

Key Responsibilities:

1. Core Values: Embody our core values in all that you do.
2. Guiding the Pack for Client Needs: Provide leadership and direction to the pack in understanding and meeting client requirements, ensuring the delivery of high-quality service and solutions.
3. Client Interaction Management & Ownership: Act as the first point of contact for client inquiries, issues, and questions, ensuring prompt and accurate responses. Facilitate effective communication between the client and the internal pack. Holds responsibility for ensuring client questions and issues are effectively resolved.
4. Financial Close: Oversee the financial close process, including the maintenance of the periodic close workbook, reviewing and scrubbing accounts, and conducting quarterly hard closes and periodic balance sheet and P&L reviews. Proactively identify and address discrepancies or inconsistencies.
5. Monthly Close Call with Client: Engage in regular close calls with the client to review financial performance, address queries, and ensure alignment with client expectations.
6. Year End Close and CPA Interaction: Lead the year-end close process, collaborating with CPAs and addressing any questions they may have. Enter year-end adjusting journal entries (AJEs) provided by the CPA.
7. Client Transition and Changes: Work closely with the Team/Pack Lead on transitioning new clients, ensuring a seamless onboarding experience. Manage updates, changes, and billing issues for existing clients throughout the engagement.
8. New Location Setup: Facilitate the setup of new locations for existing clients, coordinating with internal teams to ensure a smooth implementation process.
9. Bank Activity: Manage and analyze Level 3 bank activity, utilizing insights to inform decision-making and improve financial processes.
10. Task Review: Review outstanding tasks in Pixie on a weekly/biweekly basis, ensuring tasks are completed within set timelines. Collaborate with Junior and Staff Accountants to address overdue tasks.

11. **Future Responsibility: Sales Tax (2024):** Prepare for the upcoming responsibility of managing sales tax-related activities, ensuring compliance and accuracy.

Qualifications:

- Bachelor's degree in Accounting, Finance, Business Administration, or related field preferred.
- Proven experience in financial management, client relationship management, and team leadership.
- Strong understanding of balance sheets, P&L statements, and financial reporting.
- Excellent communication, interpersonal, and problem-solving skills.
- Proficiency in relevant software and tools, including Excel and R365.
- Strong organizational skills with the ability to manage multiple tasks and priorities.
- Adherence to professional ethics and a commitment to maintaining confidentiality.

Lion Chaser Core Values: We embody the following core values in all that we do.

Core Values	Description
Innovation	Outside the box thinker committed to continuously learning and improving. We innovate to solve problems and create value.
Accountability	We live the 200% rule. You and I each take 100% ownership for our actions and decisions. We believe in doing the right thing, even when it's not easy, because transparency and honesty are essential to building trust.
Collaboration	We leverage each other's strengths, so together, we can achieve more. We foster an environment of open communication and mutual respect, where everyone's contributions are valued and encouraged.
Courage	Never be afraid to take risks and try new things. We embrace change and are willing to step out of our comfort zones.
Entrepreneurial Spirit	We embrace failure as a learning opportunity. Pursue our passions, make a difference in the world, and create a legacy that will endure for generations to come.
Pursuit of Excellence	We hold ourselves to the highest standard, always chasing big, audacious goals, working tirelessly to achieve them, and constantly striving to improve oneself.
Tenacity	Determined to succeed no matter the challenges we face. We chase big goals and dreams with unwavering persistence!

Join our pack at Lion Chaser Development Group and contribute to our mission of providing accurate and timely financial information, so that restaurant owners can make informed decisions that drive growth and profitability. Your dedication and expertise will play a vital role in driving our success and the success of our valued clients.