

Workflow Administrator– Job Description

Tattersall Bailey is looking for a well-organised, proactive and adaptable workflow administrator to join its team. The company is rapidly expanding and there is scope for the job role to evolve with the firm.

Candidates must be self-motivated with experience of maintaining systems and workflows, and an ability to prioritise a busy workload. They should be a personable team-player with a 'can-do' attitude and willingness to help.

They will be responsible for managing and optimising the job workflow processes within the firm to ensure efficiency and accuracy. The role involves monitoring and improving workflows, as well as troubleshooting issues, documenting procedures, and collaborating with colleagues to streamline operations.

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| Job title | Workflow Administrator |
| Location | Cockermouth with occasional days in Carlisle when required |
| Employment type | Full-time, permanent |
| Company Overview | Tattersall Bailey is a modern, cloud-based accountancy practice with offices in Cockermouth and Carlisle. We are passionate about delivering excellent accounting and tax solutions to our rapidly expanding client base. |
| Reports to | Practice manager and partners |
| Salary | Competitive salary based on skills and experience |
| Benefits | <p>25 days holiday plus bank holidays (26 after 5 years)</p> <p>Birthdays off (in addition to holiday allowance)</p> <p>Smart/casual dress code</p> <p>Bonus for new client introductions</p> <p>Friendly team/staff socials</p> |
| Primary responsibilities | <p>Work with the practice manager, senior administrator and client managers to refine and implement a workflow procedure</p> <p>Work with the client managers to achieve the firm's key KPI's in processing, delegating, monitoring and signing off tax and accounting jobs coming into the practice</p> <p>Create and monitor workflow reports, and use them to feedback to the management team, monitor client penalties, and identify where jobs can be delegated</p> |



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| | <p>Identify, request, and chase up on any missing information in accounts and tax jobs submitted to the firm</p> <p>Scan client tax and accounting records to create complete jobs ready to be delegated and processed by the accounts staff</p> <p>Collate documents and create signature packs ready to send to clients once jobs have been completed</p> <p>Work with reception staff to ensure the smooth movement of client records through the practice</p> <p>Assist the administration team with general tasks and reception cover when required</p> <p>Answer and redirect external phone calls</p> |
| Essential skills and experience | <p>Ability to maintain systems and follow workflow procedures</p> <p>Proven experience in an administrative or bookkeeping/accounts role</p> <p>Good communicator</p> <p>IT literacy, especially Office 365</p> <p>Excellent organisation and time-management</p> <p>Self-motivated, flexible and quick to learn</p> <p>Team player</p> |
| Desirable skills and experience | <p>Experience in process mapping and documentation</p> <p>Good attention to detail</p> <p>Relevant qualification</p> |
| Contact details | <p>Please contact Susi Seward, practice manager, for more information or to submit a CV and cover letter.</p> <p>Susi.seward@tbc.uk.com</p> <p>01900 826111</p> <p>Applications will be reviewed on a rolling basis until the position is filled.</p> |