

POSITION DESCRIPTION

CLIENT CARE COORDINATOR/ADMINISTRATION OFFICER

PO Box 74, Camperdown 3260

mriches@sinnotts.com.au

Position Title

Client Care Coordinator & Administration Officer

Employment Type

Full Time

Position Overview

The Client Care Coordinator & Administration Officer plays a central role in ensuring exceptional client service and smooth operational support within Sinnotts Accountants. This position is responsible for managing client communication and experience, maintaining accurate records, and providing high-level administrative support to accountants and bookkeepers across all teams. The role requires strong attention to detail, excellent communication skills, and a genuine focus on client care.

Key Responsibilities

Client Care & Communication

- Act as the first point of contact for client enquiries – phone, email, or in person.
- Build positive and professional relationships with clients through timely and helpful communication.
- Schedule client meetings and coordinate appointment reminders and follow-ups.
- Assist clients with signing and returning documents.
- Monitor client satisfaction and assist in implementing service improvement initiatives.
- Manage client onboarding and offboarding processes, including preparation of engagement letters and information packs.

Administration & Practice Support

- Maintain accurate and up-to-date client details in Xero.

Key Responsibilities (cont.)

- Upload and manage client files and correspondence in SharePoint in line with firm standards.
- Process and distribute ATOMate correspondence (e.g. ATO notices) to clients or the managers.
- Prepare and format documents, reports, and client letters as requested by accountants or managers.
- Assist with preparation and lodgement of ASIC and ATO documents.
- Support staff with document management, mail, stationery orders, and general office duties.

Workflow & Coordination

- Communicate with team members to assist with scheduling, priorities, and deadlines.
- Support the Business Manager with tracking client jobs, reports, and compliance requirements.

Compliance & Confidentiality

- Ensure client records are current, secure, and compliant with privacy and professional standards.
- Adhere to Sinnotts' internal procedures for data handling, security, and document retention.
- Maintain professionalism and confidentiality in all client and business matters.

Skills and Qualifications

Essential

- Minimum 2 years' experience in administration, client service, or reception (preferably in a professional services firm).
- Excellent verbal and written communication skills, with a strong client focus.
- High attention to detail and accuracy in document handling.
- Strong organisational and time management skills.
- Proficient in Microsoft Office Suite (Word, Excel, Outlook).

Desirable

- Experience with Xero Practice Manager, SharePoint, and ATOMate.
 - Previous experience in an accounting or financial services environment.
 - Certificate or Diploma in Business Administration or related discipline.
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Attributes

- Professional, friendly, and service-oriented.
- Reliable, proactive, and committed to quality work.
- Enjoys working collaboratively across teams and departments.
- Calm and composed under pressure, with strong problem-solving ability.
- Takes pride in maintaining excellent client relationships and presentation standards.

Key Performance Indicators

- Timeliness and quality of client communication and task completion.
- Accuracy of client data and documentation.
- Adherence to firm policies and filing standards.
- Client satisfaction and feedback.
- Contribution to workflow efficiency and team collaboration.

Location

19 Pike St, Camperdown OR
118 Koroit St, Warrnambool OR
13 Murray St, Colac

Reporting To

Directors and Business Manager

Apply in writing to mriches@sinnotts.com.au or
PO Box 74, Camperdown VIC 3260
Applications close 5pm Friday 14th November 2025

www.sinnotts.com.au

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