

Operations Manager

The Operations Manager (OM) will oversee key functions across organizational and technical service management. The OM will work closely with the Partnership Group and HR Manager to ensure that firm's goals are met, and core values are maintained. The OM will report to the Partner Group with direction from the Operations Partner (Berkley).

Key Duties & Responsibilities

Organizational Management

- Translate the Partner Group's strategy into operational policies and processes. This includes implementation and monitoring of those processes.
- Oversee our ERP system (CCH iFirm), including identifying workflow efficiencies, troubleshooting, and implementation and training of new features, while maintaining the integrity and privacy of the data.
- Identify, develop and implement process improvements to streamline operations and enhance efficiency.
- Oversee CPA AB Institute compliance as it relates to operations.
- Ensure the firm's infrastructure scales appropriately with headcount, regulatory requirements and complexity of the client base.
- Manage the administration team.
- Plan and execute internal and external events, including team-building activities, client reception, and annual training meetings. Including event logistics, venue selection, coordination, budgeting and schedules.

Technical Service Management

- Serve as the main point of communication with our external IT team, including troubleshooting, and ensuring smooth technology operations, while overseeing the execution of IT policies and procedures to maintain compliance and security.
- Manage and oversee IT inventory.
- Oversee the implementation of new technology or software for operational efficiency.
- Ensure data security and compliance with relevant IT standards.
- Audit team member compliance with all technical services (examples: IT training, computer security, iFirm usage)
- Maintain and update PAND website and social media platforms.

Education & Experience

- Post-secondary degree in a related field (business administration or management, finance, human resources)
- Minimum of 5 years' administrative/management experience in professional services, preferably in a CPA firm
- Accounting experience would be considered an asset
- Project Management experience would be considered an asset

Skills & Knowledge

- Knowledge of issues affecting the accounting profession as they relate to successful management of the firm
- Knowledge of relevant accounting frameworks and file documentation best practices
- Exceptional computer and technology skills including Microsoft Suite and data management software
- Outstanding interpersonal and communication skills
- High degree of adaptability and flexibility
- Strong ability to plan, organize and monitor different functions in the firm