

## Job Description & Person Specification

### Client & Team Administrator

**Responsible To: Team Leader**

**Hours of work: Minimum of 3 days per working week**

**Salary: £22,000-£27,000 pro rata based on experience**

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#### About the role:

Our clients work in a wide range of industries from innovative engineers to specialist food and drink manufacturers.

The client & team administrator will support the Senior Tax Consultants and Caseworkers to ensure they manage and deliver an exemplary client portfolio.

The day-to day tasks that you will be required to complete can include:

- To manage all renewals, specifically the tracking of deadline dates.
- Conduct outbound client calls to make clients aware of their upcoming renewal and renewal options
- Document any relevant activity into the CRM system
- Compiling and sending out letters of authority to HMRC then following up and monitoring these responses for clients
- Assisting caseworkers and tax consultants during technical calls with clients by providing clear and accurate notes that convey the project information provided
- Liaising with clients' accountants to follow up with any finance queries
- Extensive calendar management, including booking meetings and technical calls etc.
- Assisting with invoicing and managing debt collection ensuring that invoices are paid in a timely manner and debt is kept to a minimum
- Any other ad-hoc administrative duties as required by the team

Apart from the duties summarised above, we retain the right to include other reasonable duties.

#### About Innov8

Innov8 R&D has been established for 3 years now and has enjoyed good growth during this period. At present we help over 600 clients and feel privileged to work with such talented and innovative

companies helping them with their R&D credits each year. Our team has grown to 8 but being a small business, everyone plays such an important and varied role in the future development of the business.

We are very much looking forward to the next stage of our journey and welcoming extremely motivated and talented individuals to help compliment and further develop our team.

There is a great work life balance here at Innov8 and flexibility provided. We believe in a “work hard play hard” ethos meaning we frequently engage in a multitude of team events and socials.

We offer career opportunities in a fast-growing, friendly environment with a dynamic and ambitious team.

For more information about Innov8 and are services please visit our website:

[www.innov8rnd.co.uk](http://www.innov8rnd.co.uk)

You can also find us on LinkedIn:



## Person Specification

### Essential Training and Qualifications

- Full training is provided

### Essential Experience & Skills

- An adaptable individual with exceptional interpersonal skills
- An excellent communicator – oral and written.
- A literate, numerate and accurate individual with a high level of attention to detail
- A proactive individual with an enthusiastic attitude, who has the ability to anticipate needs of team members and act as necessary
- A trustworthy individual with good listening skills
- An organised individual that can manage their time and workload in a fast-paced environment.
- Excellent note taking skills
- Excellent working knowledge of Microsoft Office products, particularly Word, Excel and Outlook as well as experience working with CRM

### Desirable Experience & Skills

- Previous experience of working in team based and consultancy environment.
- Previous experience of working in a finance team
- Previous experience of working with Monday.com
- The ability to quickly assimilate new knowledge

To apply for this role please forward your CV by [clicking here](#) or feel free to contact us for further information.