

**About the Company:**

Badger CPA was founded in 2014 to help entrepreneurs and businesses succeed. Our mission is to honor God by facilitating the financial success of business owners. Our vision is to be trusted advisors to the business owners we serve and to improve community by helping our clients grow and thrive.

Our Niche: Building the best accounting departments to improve quality of life for us and those we serve.

Our target market includes Growth-minded Business owners who:

1. Are companies with \$1M-\$25M annual revenue in specialized industries (Construction, Nonprofit, and Government Contractors)
2. Share our Core Values
3. Have a high business acumen and a no jerk policy
4. Need outsourced accounting, tax compliance & planning, QB/QBO & system implementations, payroll, and search for CFOs/Controllers

Our core values are:

1. PEOPLE FIRST Family focus, winsome and caring for others.
2. HUMILITY Admit when we are wrong, quick to listen and slow to speak, learning from others.
3. OWNERSHIP Responsible for actions, follow through on commitments, high accountability culture.
4. RESULTS MATTER Commitment to excellence, continuous improvement, celebrating wins!
5. HUSTLE Growth oriented, hungry, going above and beyond.

Position Title: Sage Intacct Implementer

Reports To: Accounting Director

Classification: Exempt

Key Functions:

1. Training/Supervising team
2. Project/High Level Work
3. Quality Control
4. Budget/Utilization of team
5. Process Improvement
6. Client Relationship/Retention

Measuring Success:

- Accuracy of Work
- Timeliness of Work/Meeting Deadlines



- Utilization
- Efficiency/Speed
- Training/Guiding team members
- Client Relationship Management/Client retention
- Team overall performance

Job Competencies:

- Acceptance of firm core values (People First, Humility, Ownership, Results Matter, and Hustle)
- Demonstrates mastery in working with GAAP accounting and guides others in analyzing accounting issues
- Leads firm efforts to inform others of developing GAAP accounting issues
- Develops GAAP accounting solutions for clients and demonstrate a deep understanding of client businesses and industries
- Demonstrates mastery of sophisticated GAAP accounting topics and the ability to apply knowledge and skill-set to GAAP accounting compliance engagements and other special projects
- Researches complex technical GAAP accounting issues and effectively communicates conclusions in writing and verbally internally and externally
- Demonstrates a strong competency in a specific subject matter and/or industry
- Effectively leads special projects for clients
- Models a commitment to ensuring that deliverables are substantially accurate and complete, and that proper documentation is retained in the file
- Models use of technology to improve methods and productivity on client projects
- Demonstrates mastery of firm accounting software and technology resources and serves as a resource to team on functionality of available tools
- Ensures projects are well- leveraged and supervised and identifies when assistance is needed and holds team accountable to budgets
- Manages accounting engagements to ensure timely delivery and efficiency while properly managing risk
- Effectively manages and maintains client relationships by setting proper expectations (scope, fees, timing, etc.) while proactively looking for additional projects within existing clients
- Consistently reviews work product on a timely basis and ensures all work product is effectively and timely reviewed by self or others
- Takes an active role in scheduling engagements and solving scheduling conflicts; strategically schedules teams for in-field workpaper preparation
- Leads team in budgeting and managing engagements
- Understands entire client service relationship, (i.e., GAAP accounting, tax, payroll, consulting, etc.) and can pull all resources together for client
- Models outstanding analytical abilities
- Assists others in determining logical solutions to problems



- Helps others think from the client's perspective
- Identifies and develops innovative solutions to bring to the client or to improve project performance
- Trains others and serves as an internal resource to staff and in-charges with respect to technical issues and firm processes
- Develops others through involving them in meetings with clients and prospects
- Provides timely, meaningful, substantive performance feedback that team members can understand and act on, and documents feedback in project evaluations and appraisals
- Communicates knowledge of office and firm goals to help others understand the big picture
- Involves applicable coach, managing partner or Human Resources in personnel issues, as appropriate
- Develops contacts and referral sources through involvement in professional or civic community organizations as a committee member or board member
- Presents and/or writes articles for Badger CPA or for industry or professional organizations
- Sells additional services to existing clients that provide value to clients, building client loyalty and satisfaction
- Attracts new clients to Badger CPA and demonstrates good client acceptance practices
- Performs year-round communication and business development with clients

Additional Implementation Consultant Competencies:

- Lead implementation activities for standard engagements
- Understand and interpret client's business and accounting policy requirements to meet their needs
- Initiate, execute, and support the customer throughout the implementation process to aid their successful adoption of system
- Lead customer training during implementation as directed
- Adhere to standard milestone-based implementation process
- Maintain target utilization as determined by supervisor
- Collaborate with supervisor to organize workload to support multiple, simultaneous implementations
- Support efforts to continuously improve Professional Services processes and procedures
- Participate in group meetings and training sessions when appropriate to gain experience and knowledge about the product
- Stay up to date on new product feature functionality

Education:

Must have a bachelor's degree in accounting, finance, business administration or related field. A master's degree or extensive experience in the financial field is preferred.



Requirements:

- Certified Public Accountant (CPA) or Certified Management Accountant (CMA)
- 5+ years similar work experience in a service company and/or CPA firm
- 5+ years work experience in leading teams
- Excellent accounting software and administration skills
- Intermediate to advanced experience in GAAP accounting and review, as well as strong problem resolution skills; requires supervisory experience
- Sage Intacct Implementation experience – must have already completed Sage Intacct implementations for past clients. Must have a full understanding of Sage Intacct modules and manage full-cycle implementation projects.

Physical Requirements:

- Consistently sit for four or more hours per day performing various tasks
- Constantly uses fingers and hands when typing, using 10-key, telephone, tools, or other equipment
- Frequently lift, transfer, push or pull up to 15 lbs. of files, boxes, or other small office equipment
- Hear average or normal conversations and receives ordinary information through verbal communications
- Use average, ordinary visual acuity necessary to utilize the computer or other office machinery and to read or write instruction manuals or other documents
- Frequently move about the office which may include climbing stairs, stopping, kneeling, and/or bending
- May travel to attend events or to attend other business activities

Working Conditions:

- The work setting is a hybrid home office and traditional office environment located inside a building with no hazardous or significantly unpleasant conditions
- Conceptual/Intellectual Activities and Requirements:
 - Frequently convey detailed or important instructions or ideas accurately, clearly, and quickly
 - Understand, remember, follow, and exchange complex instructions, information, and guidelines.
 - Organize thoughts and ideas into understandable terminology
 - Ability to apply common sense reasoning and decision-making to carry out detailed, involved financial transactions, and to resolve problems involving several concrete variables
- Dependable attendance and punctuality are necessary to perform the essential job duties
- Willingness to participate in training and development opportunities to improve job knowledge of company policies, procedures, and services



- Available to work occasional long hours when necessary to reach goals. Including evenings and weekends as required

This job description in no way states or implies that these are the only duties to be performed by the employee in this position. Requirements are representative of minimum levels of knowledge, skills, and/or abilities. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Additionally, this document does not create an employment contract, implied or otherwise.