



GDA SPEAKERS PERFORMANCE SCORECARD ATTRIBUTES

Job Title:
Operations Manager

Date Prepared:
November 2022

Department:
Operations

Reports to:
President

Position Summary:

The Operations Manager will plan, direct, coordinate, and oversee operations activities in the organization, ensuring development and implementation of efficient operations and cost-effective systems to meet current and future needs of the organization with a strong emphasis on Accounting and Finance. The successful candidate is continuously finding ways to improve efficiency and profit through systems and people. The successful candidate is responsible for upholding the profitability and values of the organization by leading business operations. Their duties include consulting with the leadership team, to determine business goals or initiatives, visiting with managers to relay information about company needs and reviewing operational data to make inferences about their organization's success.

Key Measures For Success:

- **Finance and Accounting:** All finance and accounting is accurate and delivered on a timely basis. This includes a solid working relationship with our CPA.
- **Systems:** All departments run at a high level of efficiency and productivity. All processes and systems are developed, simplified, and regularly tweaked to save money and time, and meet the changing needs of the company and customers. Systems include EOS, Google, Phone Systems, Docusign. This requires a solid working relationship with Innovative Way and all other systems vendors.
- **Contracts:** Effectively supports the Sales team to expedite contracts and remove them as a barrier to sales productivity.
- **People/Environment:** Create a welcoming office environment which includes onboard, offboarding, HR administration and upholding GDA Culture through Language and actions.

Core Competencies:

- Approachability - easy to approach, warm and gracious, good listener, builds rapport well, makes an effort in relating and putting others at ease.
- Compassion - genuinely cares about people, is concerned about their problem, is available and helpful, demonstrates real empathy with the joy or pain of others.
- Composure - Skilled under pressure, not defensive, handles stress does not go silent or become moody.
- Customer Focus - dedicated to meeting the needs of external and internal customers.
- Ethics and Values - Follows core values during good and bad times, acts in line with those values.



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- Integrity and Trust - widely trusted by others
- Informing Others - provides information people need to know in a timely manner. Explains where info is found and empowers others to make decisions based on info.
- Organizing - arranges information usefully and makes sure it is accessible for those who need it.
- Peer Relationships - team mentality, gains trust and support, encourages collaborations, can solve problems with peers.
- Process Management - organizes both thinking and people to understand efficient work flow. Thinks methodically and simplifies complex processes. Gets more out of fewer resources.

Duties/Responsibilities:

Leadership

- Provide day-to-day leadership and management for the operational side of the business
- Conduct and facilitate EOS meetings including L10, Quarterly conversations, Quarterly and Annual Meetings to maximize the efficiency and focus of the leadership team.
- Embody company culture and maintain high employee engagement
- Provide a positive work experience for employees
- Responsible for the measurement and effectiveness of all processes internal and external
- Provides timely, accurate and complete reports on the operating condition of the company
- Foster a success-oriented, accountable environment within the company
- Ensure correct usage of Back Office and other sales applications in coordination with the Sales and Events Manager
- Train, advance, manage and evolve GDA Speaker's processes

Accounting

- Oversight of all financial activity
- Pay company bills and speakers
- Develop trusted relationships with client/vendor financial contacts
- Control office expenses to ensure profitability
- Provide weekly cash flow reports to executive team
- Reconcile bank and investment statements monthly
- Create P/L statement, balance sheet, and budget to actual report NLT the 15th of each month
- Update and maintain the Accounting Procedures Manual; including the documentation of Back Office accounting procedures
- Track company real estate lease agreements and renewal deadlines
- Maintain a relationship with all banking and financial partners
- Stay abreast of existing GDA financial investments and notify executive team on any necessary immediate action
- Track Nando Parrado expenses and reimbursements and 1042 reporting

Contracts

- Streamline the contracts process to eliminate the contract's barrier
- Review and update contracts on a daily basis
- Ensure that employees and interested parties understand contracts through training when applicable
- Negotiate contract terms as needed
- Analyze potential risks involved with specific contract terms
- Stay up-to date with any special terms from our clients and speakers (Bureau/Management/Direct)
- Ensure payment schedules are consistent with the contract and Back Office data
- Maintain organized system of digital records



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- Create language standards for terms in Back Office

Payroll

- Produce bi-monthly payroll with commission allocations and payroll tax posting
- Bi-monthly 941 deposit via EFTPS
- Bi-monthly 401k deposit via website
- Monthly deposits to Georgia Dept. of Revenue
- Adjust QuickBooks Payroll for all approved changes for Sales Agent commissions
- Quarterly and annual reports (TWC, 941, Sales Tax, Franchise Tax, 940, 1099, W-2, and 1042)
- Update employee IRS forms
- Prepare annual Total Comp Reports for all staff by Jan 31 each year

Budget Preparation

- Coordinate with Sales and Event Manager to ensure that sales team have input accurate/up to date information in Back Office to be included in projections
- Forecast upcoming monthly, quarterly, annual projections
- Plan and facilitate yearly budget meeting with company executives.
- Provide quarterly updates, recommendations, and analysis to executive team on existing investment ROI's and future forecasts
- Begin in Oct, for coming year, budget complete NLT December 15
- Coordinate Profit Sharing analysis
- Collaborate in budget preparation
- Own relationship with provider of 401(k) plan
- Assist with the preparation and discussion of financial standings at the Board of Advisors Annual Meeting

Office Maintenance

- Oversee the purchase and maintenance of office furniture and equipment
- Maintain printer/copier lease. Make new recommendation(s)
- Track all company financial agreements and expiration dates. Give 30 day notice of all expiration dates.
- Own vendor agreements/relationships (building lease with Property Management Company, Logix, SOS, Kevin Ortman, IMDB, etc.)
- Maintain insurance files, agreements and relationships
- Help apply, track and maintain current and future certifications for DBA, HUB, TRC and WBENC
- Update and maintain procedures manual
- Coordinate holiday gift-giving process to clients and speakers

Hiring

- Draft and post all job openings
- Conduct all initial interviews with potential candidates
- Ensure team follows GDA Interview format
- Participate in interview process
- Prepare and complete Pre-boarding checklist
- Participate in preparation of offer letter
- Complete background and credit checks for all new hires
- Ensure references are checked



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Employee/Contractor Onboarding

- Distribute new hire paperwork
- Responsible for ensuring completion of Onboarding checklist (provide GDA office guidelines, HR paperwork)
- Maintain office key and security keycard log

Employee/Contractor Off-boarding

- Complete termination paperwork
- Responsible for ensuring completion of the Off-Boarding checklist (no items can be skipped)
- Schedule and ensure exit interview is conducted and documented

HR Documents and Employee files

- Maintains employee job descriptions
- Maintains company organizational chart
- Maintain all other HR documents and forms
- Maintain and track new and existing Human Resource files
- Obtain/Update employee forms on an annual basis (W-4, W-9, TX Employee New Hire Reporting Form, IRS Mileage Reimbursement, IRS Employee Benefits limits)
- Ensure files are secure at all times and made available only to authorized personnel
- Create and maintain a site map to allow easy access by entire leadership team

Company Health Plan

- Reevaluate new options for company health plans/benefits (Oct., Nov.) of previous year for upcoming enrollment (January Enrollment)
- Work with benefits provider to present annual benefits to employees and ensure enrollment
- Enroll full-time employees in 401k, HSA, medical and dental/vision plans (if necessary)
- Communicate ongoing benefit plan updates to employees
- Maintain insurance files

Quarterly Conversations:

- Schedule Quarterly Conversations for employee performance reviews
- Alert company management of staff evaluations 30 days in advance
- Prepare all required paperwork, surveys, etc. for evaluations
- Complete evaluation process by following up with Managers and employees to update Scorecard and Goals & Objectives
- Provide support in facilitating personal improvement plans

HR Policies and Procedures

- Ensures policies and procedures are compliant with state and federal laws and regulations
- Maintain written HR policies and procedures handbook
- Provide employees with timely updates to company policies and procedures
- Field questions from employees regarding Human Resources issues as appropriate
- Manage relationship with HumCap

Former Employee Maintenance

- Respond to requests for confirmation of employment for previous employees
- Respond to official requests for Unemployment, Disability, Worker's Comp. etc.
- Manage health continuance of former employees



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Problem Solving and Decision Making

- Quickly assess and expedite the resolution of client problems and complaints
- Advanced ability to examine existing processes to ensure they are effective and efficient
- Advanced ability in process design/process improvement techniques
- Proven ability to implement process improvements efficiently

GDA Culture

- Arrives on time/prepared to meetings
- Never complains, rather makes suggestions for solutions
- Treats everyone on GDA team with respect and civility

Required Knowledge/Skills/Abilities:

- **Professionalism** in dealing with other team members, clients, speakers, prospects, and organizations. Uphold the culture, goals and brand of GDA Speakers through words, actions, and appearance
- Demonstrate **Teamwork** and identify the touch points between your role and the other organizational roles to better understand the intersections and dependencies. Effectively collaborate and communicate expectations and outcomes. Offer support, when available, to help others achieve their stated goals. Solicit support, when needed, to achieve your stated goals
- **Business Acumen** to act as the general manager of your area of responsibility and expected outcomes. Expect excellent results from yourself and teammates; deliver on your commitments in a timely manner. Treat the company finances as you would your own.
- Advanced knowledge of **Google Suite** (Google Docs, Sheets, Slides, Drive)
- Effective **Communication** to demonstrate strong written, verbal and presentation skills. Strive to over communicate.
- Ability to **Prioritize Tasks** and activities to ensure that all commitments are progressing at an acceptable pace. Acute **Attention to Detail** to ensure all transactions are accurate.

Required Education/Experience:

Bachelor's degree in accounting or finance

2-5 years of bookkeeping experience including QuickBooks knowledge

Office Management experience

Experience with HR and Payroll

Expected Hours:

Full time, 40+ hours

Compensation

- Salary commensurate with experience
- Bonus opportunities if company exceed sales goals
- Company-paid Medical, Dental and Vision packages available
- 401k matching
- Discretionary Personal Time Off (PTO) provided after probationary period per employee manual