

We Are Seeking a Project Leader / Administrative Manager (AM)

Who will support our CEO, Mark McKenna Little

Rainy Day Financial, LLC . 7660 Fay Avenue, H111, La Jolla, California

Who We Are: We are a small business, comprised of a team (12 people) serving a community of 50 Ideal Client families. Our team's goal is to coordinate every aspect of our client's personal financial affairs to maximize their ability to live their ideal lives, free from financial concerns.

Position: We are seeking a Project Leader who will coordinate a small team, coordinate an existing project and report progress weekly to the CEO. The "project" is to implement a documented system for delivering Comprehensive Financial Services through our team of Subject Matter Experts. The successful candidate will also be asked to protect our CEO's time via calendar management, email management, and ensuring that important interactions are well documented. The job title is "Administrative Manager" (AM) and this position will entail,

✓ Project Leadership and Oversight

- The on-going project is to deliver an extraordinary client experience for our Ideal Clients through our team of Subject Matter Experts
- To continue to elevate that Ideal Client experience over time (continual improvement)
 - We use The Trusted Advisor Toolkit™ (The Toolkit), an online cloud-based system, as a team work area
 1. Confirm team assignments (Deliverables Checkpoints™) through an Online Meeting Plan™ for every client progress meetings
 2. Provide access to client information and documents
 3. As a record of team collaboration and conversations
 4. Allow Deliverables Team Members to review each other's work prior to client progress meetings
 5. Pull together for the CEO all of the documents required for a successful Ideal Client Meeting
 6. The result of which is an extraordinary client experience, including but not limited to, delivering Truly Comprehensive Financial Services™.
- As project leader, your primary role will be the implementation of The Trusted Advisor Toolkit™ (The Toolkit), strategies and tactics, in sequence, as laid-out by The Toolkit, which is well-documented, process-driven. Right now, we are in the process of adopting and learning to use of this tool in our practice. It's proper roll-out and implementation will be your direct responsibility because The Toolkit will be the foundation of our Ideal Client Happiness. Unlimited support is in-place through The Toolkit. As project leader, your job will be to,
 - Coordinate our Deliverables Team Members
 - Coordinate all client progress meeting to ensure everything "gets done" by our team prior to every client progress meeting.
 - Ensure forward progress, implementing The Trusted Advisor Toolkit™, on a daily basis, and to proactively contact The Toolkit for help if progress slows or stalls for any reason.
 - While The Toolkit provides your implementation framework and structure it is your job to document the specific processes to be followed by your team.

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✓ **Project Leadership and Oversight (cont.'d)**

- There are 3 groups of people who have action items, which you will coordinate, prior to every client progress meeting. It's your job to ensure everything assigned "gets done" before the deadline,
 1. You, as Administrative Manager.
 2. Subject Matter Experts (They'll be doing the heavy lifting)
 3. CEO/Trusted Advisor
- To be excessively clear, timely implementation of The Toolkit is your primary objective and you are to allow no one to stand in the way. Not Subject Matter Experts, your boss or office distractions & duties (such as Non-ideal Clients).
- Serving Non-ideal Clients, or survival clients, are not a part of this job description.
- If you have any other duties which do not pertain to serving Ideal Clients, and improving the Ideal Client experience, you will request a separate job description for those duties with the understanding that this job takes precedence over all other duties. (It would be prudent to also clearly spell out the time allocations for each of those job descriptions).

✓ **Additional "Administrative Manager" skills required...**

✓ **Calendar Management**

- Appointment Setting for the CEO/Trusted Advisor
- Appointment Confirmations
- Meeting coordination involving Trusted Advisor, Subject Matter Experts, & our Ideal Clients.
- Key skill: The ability to skillfully communicate directly with busy successful people to coordinate calendars and ensure meetings are scheduled promptly

✓ **Email Management: Respond to my business emails**

✓ **Meeting documentation**

- Ensure meetings and certain phone calls held by our CEO are well documented with the notes available to others on the team. This will often require creating the notes, using our format called The Interaction Log™, and making those notes available to the others on the team via The Toolkit. The Interaction Log™ is a 1-page bullet-pointed summary format from meeting recordings & meeting notes (we provide training for this format)
- Create The Interaction Log™ for interactions of our CEO and paste them into our CRM (InfusionSoft).

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Compensation: This is a full-time paid position with compensation based upon skill and experience. We are willing to pay a premium for effective “project leader” experience along with strong administrative and management skills.

Work Time Zone:

We work approximately 8 hour days, normal business hours, Mon – Fri U.S. Pacific Time.

6-weeks of paid personal discretionary leave:

After a 90-day trial period, you will be granted 6-weeks of personal discretionary leave, to use as you require.

- You may take a minimum of a ½ day of leave,
- You will have to ensure your responsibilities are “covered” by someone else on our team,
- You must give notice in advance of taking a day of leave, (which must be then approved),
- Days of leave must be used or lost and may not be carried forward
- Your available days of leave will expire on a rolling-basis,
- If you join our team, complete details about your 6-weeks of discretionary leave will be provided to you.

We’re also closed nine business days per year. 2014:

- | | |
|--------------------------------|--------------|
| 1. New Year’s Day | January 1 |
| 2. Martin Luther King, Jr. Day | January 20 |
| 3. Washington's Birthday | February 17 |
| 4. Good Friday | April 18 |
| 5. Memorial Day | May 26 |
| 6. Independence Day | July 4th |
| 7. Labor Day | September 1 |
| 8. Thanksgiving Day | November 27* |
| 9. Christmas | December 25 |

About Us: We are a retail financial advisory firm delivering Comprehensive Financial Services to a small community of affluent clients; our clients are either individuals or families. We coordinate **all** the personal financial affairs (tax, financial planning, estate planning, investment management and insurance consulting), for a flat fee-for-service. We deliver these services through a skilled team of Subject Matter Experts (some are salaried employees, others are independent contractors working for outside professional firms). As project leader, you will coordinate this team of Subject Matter Experts to prepare for extraordinary client progress meetings with each of our firm’s clients.

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Skill Sets Required:

- **Leadership skills**
 - Understands the mission of your project and keeps the team focused
 - Persuasive and is capable of inspiring others to produce a desired outcome
 - Skilled at getting things done through others
 - Skilled at managing a small team
 - Capable of maintaining forward-progress with a project, without stalling-out or slowing-down the project (you will always insist upon forward-progress)
- **Attention to detail**
 - Has the ability to notice and fix your own mistakes
 - Ability to do things in a way that you spot your own errors.
 - Always utilizes tools available to catch mistakes (spell-checkers etc.).
 - You enjoy being perceived as “careful:” you feel that catching careless errors is important and you hate it when others find mistakes that you missed.
- **Ability to prioritize**
 - You write down your commitments; you document everything you promise
 - You maintain a prioritized action list of all action items & to-do’s
 - You are “calendar-driven.” You document your planned activities on your calendar and then you “honor your calendar.”
 - You never miss deadlines or appointments without notice well in-advance
- **Analytical aptitude**
 - An individual who considers themselves to be a science or technically-oriented person or logical or a “problem solver.”
 - An individual who can see the big picture & then “connect the dots”
 - Examples of analytical aptitude
 - Creating & managing action sequences in InfusionSoft.
 - Comfortable HTML & CSS
 - Project management or Flow-charting
 - Any type of rudimentary computer programming

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- **Proactive**
 - You finish what you start: You take responsibility for “seeing things through.”
 - You take responsibility for “unsticking” problems and/or getting help; no project or initiative is left to stagnate.
 - You refuse to give up & don’t quit: If you don’t know what to do, you don’t ignore it. You do something (resourceful) or ask for advice. Doing “nothing” is not an option for you.
 - You have a reputation for solving problems. Among other ways you solve problems you...
 - Insist upon daily, or regular, check-ins with your team members
 - Bounce ideas off knowledgeable people; getting continual feedback from others (people on our team or external people)
 - Thinking ahead & thinking things through; you stay “ahead” of issues and problems by not waiting for things to “blow up.”
- Others describe you as “resourceful”
 - You have the ability to think of alternate approaches and “other things to try” which allows you to “never give up.”
 - Your instinct is to try everything to fix or resolve a problem on your own.
 - You know your strengths and limitations: You recognize when you’re making progress versus “spinning your wheels” and going nowhere with a task or project.
 - You are not afraid to ask for advice/ideas if you get stuck.
- **Communication skills; skill with the English language is essential in this job.**
 - Writing skills (notes and emails)
 - Phone skills (confirming or rescheduling appointments with our clients)

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- **You are self-disciplined.**
 - You are able to work independently and also work well as a member of a team.
 - You are able to work remotely from home without distractions or losing productivity.
 - While we offer some training and support for many of the systems we utilize, we expect you to make an attempt at self-training by first reviewing training documentation offered by the online system or application
 - We provide online self-paced training for many applications we use. We expect you to be able and willing to complete those training on your own without prompting.
 - You may be trusted to seek out additional work if you have time available.
- **You are reliable**
 - You have a reputation for “showing up on time;” you respect others’ time. If you’re going to be late, it’s rare, and you provide as much advance notice as possible to the others affected.
 - Do what you say you’re going to do; what you say and what you do are the same.
 - You finish what you start: you have a reputation for seeing things through to completion.
 - You are pleasant, likeable & collegial; you are able to have the “courage of your convictions” while, at the same time, working well with others.
- **Tech requirements: We utilize a number of online apps, while we’ll train on these here are our expectations. These should describe you...**
 - You own a computer (less than 3 years old) and have a fast internet connection
 - You are comfortable with web applications and enjoy learning new systems on the web

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Software Skills (additional skills worth a premium to us)

While not a requirement, your skill and experience with these programs and systems (listed below) **are worth a premium** to us.

If you aren't already skilled in these applications, you commit to learning them as needed:

1. We use MS Office (you will need to be able to open and edit documents)

- MS Word
- MS Excel
 - Able to set up a spread sheet, add or average a row of numbers, be able to perform simple math using cell formulas
 - Perform routine monthly reconciliation of our clients
(Will be supervised, but ability to work comfortably in spreadsheets is necessary)
- MS PowerPoint

2. We use Google Apps

- Google Drive
(secured cloud storage of documents and media, accessible by our team)
- Google Spreadsheets (often as “tracking checklists”)
- Gmail
- Google Calendar (GVA will manage our CEO’s calendar)

3. InfusionSoft

4. Adobe PhotoShop

5. Adobe Audition

6. Adobe Illustrator

7. Camtasia by Techsmith