

Integrator Job Description

Location: Charleston, SC

Reports to: Founder

Job Summary:

Chief Operating Officer: Our team runs on EOS so if you are familiar with that operating system, this position is known as “The Integrator.” The Integrator is responsible for harmonizing the various functions of the organization to achieve strategic objectives. This role involves working closely with the leadership team to translate the company's vision into actionable plans, ensuring that all departments are aligned and collaborating effectively. The Integrator acts as the glue that holds the organization together, fostering communication, accountability, and consistency across all levels of the business.

This person will be a long-term hire who manages the team well, helps to accelerate what’s already working, and can be counted on to do these things well without much supervision. We need to bring on a leader with small business experience to help us maximize our growth and profitability.

This person must be approachable, trustworthy, proficient at making hires for producer roles, candid, capable of creating a positive management atmosphere, and have a good work history / references.

Experience as a CEO or business owner is a plus, management experience is a must. Experience with CPA’s would be helpful but not necessary.

We know this position may initially have some excess capacity. That being said, a self-starter who is capable of seeing where they can benefit the team, can assist us in completing important projects and drive growth will be challenged and successful.

About the Company: Poe Group Advisors is a boutique brokerage firm specializing in accounting firm sales across North America. We have a small team of 10 people (some contract and some W-2 employees) based in the US and a separate Canadian based team that operates like a franchise. Our team has both hybrid office and fully remote team members. Capability managing in these different environments will be important. Also, we are an entrepreneurial company and want someone good at avoiding too much bureaucracy in our processes and systems. We like to stay agile and keep things simple. We are a fast-paced team and we make modifications swiftly. We’re a relatively small office headquartered in Charleston, SC - so people often wear many hats. A person who is comfortable with this environment is a must.

Our company values are:

- High-Trust
- Collaborative and Candid
- Results-Oriented
- Fun and balanced (Work-hard, play-hard)
- Play the long game (Generous to our profession)

Qualifications:

- **Education:** Bachelor's degree required (Business Administration, Operations Management, or a related field.)
- **Experience:** Minimum of 5-7 years of experience in a leadership or operations role, preferably in a fast-paced environment.
- **Skills:**
 - Strong leadership and team management skills.
 - Excellent communication and interpersonal skills.
 - Proven ability to manage complex projects and initiatives.
 - Strong analytical and problem-solving abilities.
 - Ability to work under pressure and manage multiple priorities.
 - Proficiency in project management and business operations software.

Key Competencies:

- **Vision Execution:** Ability to translate high-level strategy into detailed, actionable plans.
- **Process and Detail Oriented:** A focus on process improvement and operational efficiency.
- **Collaborative Leadership:** Skilled at working with and leading cross-functional teams.
- **Results-Driven:** A strong focus on achieving goals and delivering results.
- **Conflict Resolution:** Effective at mediating disputes and fostering collaboration.
- **Adaptability:** Ability to navigate change and adapt to new challenges quickly.

Key Responsibilities Include:

1. **Operational Alignment:**
 - Ensure that all departments and teams are aligned with the company's strategic goals and objectives.
 - Facilitate effective communication between departments to ensure seamless operations.
 - Translate the CEO's vision into practical, executable plans that drive the company forward.
2. **Project Management:**
 - Oversee the execution of key projects and initiatives, ensuring they are completed on time and within budget.

- o Monitor progress on company goals and projects, identifying any roadblocks and working to resolve them.
 - o Coordinate with department heads to ensure resources are allocated effectively.
3. **Process Improvement:**
 - o Identify areas for process improvement and implement solutions that increase efficiency and effectiveness.
 - o Standardize processes across the organization to ensure consistency and scalability.
 4. **Leadership and Team Management:**
 - o Act as a leader within the organization, motivating teams and fostering a culture of accountability and excellence.
 - o Work closely with the leadership team to manage company priorities and ensure everyone is focused on the right tasks.
 - o Provide support and guidance to department heads, helping them to overcome challenges and achieve their goals.
 5. **Performance Monitoring and Reporting:**
 - o Track key performance indicators (KPIs) and metrics to assess the overall health of the organization.
 - o Prepare regular reports for the CEO and leadership team, highlighting progress, challenges, and opportunities.
 - o Ensure that the organization is meeting its financial, operational, and strategic targets.
 6. **Conflict Resolution:**
 - o Address and resolve conflicts between departments or team members, ensuring a positive and collaborative working environment.
 - o Mediate any disputes or disagreements that may arise, focusing on finding solutions that benefit the organization as a whole.
 7. **Strategic Planning Support:**
 - o Assist the CEO and leadership team in developing long-term strategies for the company.
 - o Provide input and insights based on operational realities, helping to shape the company's strategic direction.
 - o Ensure that strategic plans are realistic, actionable, and aligned with the company's capabilities and resources.

Sample Day-to-Day Duties:

- Talent management of the broker and sales teams
- Orchestrate training and onboarding for new broker and sales staff
- Help monitor broker performance and provide accountability
- Manage business vendor management (IT, building management, CRM)
- Identify opportunities for staff coaching/development
- Participate in one-on-one meetings with the broker team
- Participate in Leadership strategy meetings

- Manage data dashboards and reports (Listing report review of all firms for sale)
- Collaborate with department owners to explore data to drive decision making needs
- Own EOS implementation across the full organization
- Create a staffing plan based on organizational strategy
- Participate in weekly broker full-team meetings
- Act as client-facing support for issues with Brokers / Clients
- Report to the owner on sales and broker team performance
- Streamline and implement processes for sales and customer service
- Ensure that best practices are shared/leveraged throughout the organization and facilitate internal communications
- Monitor and report escalated client issues to the Leadership team
- Manage special brokerage projects
- Help vet team ideas (Team has a LOT of ideas that need to be filtered.)
- Participate in / organize industry events as appropriate
- Pursue professional development
- Collaborate with the owner on team "goal setting" and ensure the team meets goals
- Assist with financial planning, payroll and bookkeeping management
- Work with operations manager to oversee hybrid staff
- Assist owner with delegation of tasks
- Work with lawyers if and when necessary for contract improvements
- Act as liaison for Canada and U.S based teams

Next Steps:

- Complete the online application, [linked here](#), and submit a copy of your resume and cover letter. Please also provide minimum salary requirement. Final salary will be negotiated based on the candidate's skills, experience, and fit for the role.
- If advanced, a member of the hiring team will schedule a series of phone, Zoom, and in-person interviews, including an invitation to take an online Kolbe assessment.
- The final interview will be a casual dinner with the CEO.
- 3 references will be requested and contacted.