



JOB DESCRIPTION

JOB TITLE: CONSULTANT

EXEMPT: Yes

REPORTS TO: Principals

DATE: March 2018

SUMMARY: Assists in the daily operation of TPO including client and business affiliate relations, business development, and TPO administration, under general supervision and in accordance with established quality standards, client service standards, and work procedures. Resolves routine and complicated employee relations issues effectively by investigating and practicing active communications skills, analyzing information, and recommending appropriate action in partnership with clients and TPO associates, keeping in mind legal, business, and employee/management concerns. All duties performed within individual competencies, and in compliance with state and federal employment regulations.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

A. CONSULTATION/PROJECT/PRODUCT PRODUCTION, DELIVERY AND SUPPORT

- Meets with clients to consult on the scope and process of consulting projects.
- Provides legally sufficient consultation by phone, email or in person to answer questions and work through various technical support and employee relations issues with members (authorized company representatives) and clients – with a focus on employee relations implications.
- Develops, customizes, produces and delivers project-based consulting assignments including, but not limited to, TPO's HR Administration Kit, Employee Handbooks, Job Descriptions, Employer Policy and Procedure Manuals, Compliance Reviews (Audits), Leave Management Support Systems, Employee Relations Interventions, Investigations, and hourly consulting for self, Associates and/or Principals as needed or assigned.
- As qualified, promotes and delivers high-level HR consulting services including: workplace investigations, strategic and workforce planning, performance management, retention strategies, executive coaching, teambuilding, and mission/ vision statement development.
- Audits the quality and consistency of draft and final products, forms and documents for delivery.
- Follows up regularly with clients to answer questions to help ensure desired outcomes and promote membership and training.
- Maintains current project & billing status report, including up-to-date Dashboard for staff and one-on-one meeting updates and reports.
- Contributes to data base accuracy by ensuring that most current documents are updated on the system.
- Collaborates with coworkers to ensure accuracy, high quality and efficient results.

B. TRAINING

- Assists with planning and conducting various leadership skills training programs for members, clients and community groups (Series, Workshops, Briefings, Marketing Presentations, Webinars, etc.).
- Presents pre-developed TPO training programs and customizes training programs according to client / audience needs.
- Coordinates and/or produces handout materials.
- Ensures equipment and other logistics are in place. Occasionally sets up technical systems for presentations.
- Ensures all TPO Training Procedures are followed and that program evaluations are gathered and followed-up on.

C. BUSINESS DEVELOPMENT

- Meets and exceeds established individual budget and strives to achieve financial goals.

- Participates in all TPO sales and marketing activities as assigned, involving full-range of TPO offerings including memberships, TPO Institute and other training courses, products such as the HR Administration Kit, and other special projects and promotions.
- Conducts annual member check-ups, strives for membership retention, and maintains ongoing contact and relationship building and follow-through to identify needs and new value add business opportunities from existing clients.
- Maintains a balance between business development, consulting and delivery (billing), and practice/TPO administration.
- Establishes ongoing affiliate relationships to broaden TPO resources for our clients, and to cross-refer business.
- Contacts prospective clients by phone, through mail and in person with the goal of establishing interest and setting an appointment to determine needs and TPO fit to provide services.
- Travels as necessary to call on prospective (and current) clients to illustrate TPO products and services.
- Meets with current and prospective clients on their current, past and desired employment needs/issues.
- Based on discovered compatible needs/issues, explains appropriate TPO products and services, illustrating how TPO's products and services meet the prospective clients' needs/issues.
- Quotes prices and payment terms and prepares and executes sales contracts and agreements. Tracks and manages projects to ensure billable amounts align with contract quotes. Advises client of anticipated overages in advance of performing additional hours to ensure authority is gained and client relations are positive.
- Estimates the date of delivery to clients, based on knowledge of TPO's production and delivery schedules. Practices ongoing client communication about deadlines and deliverables.
- Prepares reports of sales transactions and keeps expense accounts.
- Using personal initiative and creativity, generates sales in accordance with established marketing procedures.
- Presents products, services and educational programs to business organizations, professional associations and social clubs.
- Invites strong prospects and affiliates to External HR Support Briefings and other showcasing opportunities and follows-up.

D. OTHER TPO SERVICES AND ACTIVITIES

- Attends TPO's Annual Employment Law & Leadership Conference and other workshops utilizing forum for professional knowledge development and client-relations opportunities.
- Assists in the publication of TPO eNews, eCompliance and other communications, including timely submission of articles from presentations and/or editing all submitted material.
- Stays abreast of current employment regulations, court decisions, and HR trends. Reads, retains and uses knowledge of employment related articles and educational information.
- Provides management and human resources consulting under increasingly limited direction of Associates and/or Principals, according to established competencies and familiarity with TPO policies and practices.

E. ADMINISTRATION

- Consistently uses contact management data base to track all communications with prospects, clients, affiliates, and others. Accurately files all correspondence, and documents pertaining to clients, reference materials, and TPO projects.
- Accurately records all billable hours (or non-billable hours as directed) and submits month end reports to Principal for accounts receivable processing.
- Assists in the general consistency, quality and efficiency of the Administrative Staff's performance and provides positive reinforcement and/or necessary training and coaching to facilitate improvements/corrections or, if necessary, coordinates with a Principal for handling.
- Interfaces with clients and other business associates as generally directed, and on behalf of TPO.

- Cooperates and coordinates with all others performing the following duties to ensure smooth office administration and client services:
 - Answers phones, takes messages, greets visitors, clients and others doing business with TPO.
 - Produces high quality, grammatically correct correspondence and work products.
 - Copies documents, reports and correspondence.
 - Provides/inputs accurate information to be used in the database.
 - Informs Principals immediately of any potential problems with clients or business affiliates for proper handling.
- In the absence of administrative staff, ensures that opening procedures are followed to properly open the office, checking main TPO voicemail.
- In the absence of administrative staff, ensures that closing procedures are followed to properly shut-down computers, initiate voicemail system, secure the building and drop outgoing mail at post office, if necessary.

F. GENERAL

- Meets and exceeds established individual budget and strives to achieve financial goals.
- Meets or exceeds performance standards indicated on the General Job Performance Factors section of TPO's Performance Planning & Appraisal Program.
- Establishes and maintains effective channels of communications with Principals, coworkers, clients, affiliates, vendors, and all other business contacts.
- Proactively assists coworkers with technical, procedural and other issues as needed or requested.
- Uses equipment and materials in a safe and acceptable manner, follows established safety procedures, uses appropriate safeguards, and observes common sense rules of safety in all on-the-job activities.
- Conducts and presents self in a manner reflecting credit on TPO and encourages others to do the same, and in accordance with the TPO Business Principles.

QUALIFICATION REQUIREMENTS:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. Requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

EDUCATION and/or EXPERIENCE:

- Bachelor's degree (B.A./S.) or equivalent from four-year college or certificate program; and a minimum of five years related exempt-level Human Resources generalist experience and/or training; or equivalent combination of education and Human Resources and Sales and Marketing experience.
- SPHR or SHRM-SCP required (within 6 months post-hire) with SPHR-CA preferred.
- Knowledge of, and previous experience with, general management principles; personnel administration and training; federal, state and local laws and regulations governing employment; principles of effective supervision and training.

LANGUAGE SKILLS:

- Ability to read, analyze, and interpret employment regulations and journals. Ability to respond to detailed inquiries from clients and business affiliates (think on your feet). Ability to write memos and articles for publication that conform to prescribed style and format. Ability to effectively present information to Principals, TPO Consultants, staff, affiliates, clients, prospective clients and others. Bi-Lingual/Cultural Spanish desired.

MATHEMATICAL SKILLS:

- Ability to work with mathematical concepts such as probability and statistical inference, and sales projections. Ability to apply concepts such as fractions, percentages, ratios, and proportions to practical situations.

REASONING ABILITY:

- Ability to define problems, collect data, establish facts, and draw valid conclusions.

OTHER SKILLS and ABILITIES:

- Must have superior organizational skills, be independent and self-motivated (entrepreneurial), enthusiastic, dependable, detail-oriented, flexible in scheduling and prioritization, and driven by excellence – trustworthy and confidential.
- Must possess exceptional written and verbal communication, including focused listening skills and accurate grammar and business correspondence knowledge.
- Interpersonal skills must be exceptional to maintain positive internal and external relationships – maintains pleasant, friendly style while avoiding over-familiarity.
- Personable and engaging presentation skills.
- Skilled at researching, analyzing and conveying technical information.
- Thorough knowledge of human resources, office administration and skilled in sales and marketing.
- Working knowledge of efficient filing systems, office machines and equipment, including computer software (MS Office proficiency a must).
- Must have valid driver’s license, good driving record, and associated insurance coverage.
- Must present a neat, professional appearance.
- Must be able to adjust tasks in accordance with changing deadlines and priorities.

PHYSICAL DEMANDS: physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee is regularly required to talk or hear. Employee is frequently required to sit; stand (up to full day training programs); walk; use hands to finger, handle, or feel objects, tools, or controls. Employee is occasionally required to reach with hands and arms; climb or balance; stoop, kneel, or crouch.
- Employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, peripheral vision, depth perception, and the ability to adjust focus.
- Many services are provided at client locations, in which case the work environment will vary.

WORK ENVIRONMENT: work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee occasionally works near moving mechanical parts and is occasionally exposed to the risk of electrical shock.
- Noise level in the work environment is usually moderate.

Signature of Approval: _____
TPO PRINCIPAL

ACKNOWLEDGMENT& RECEIPT

I acknowledge that I have received, read, and sought clarification of any questions I have about the content of this job description. I further understand that, in order for TPO to retain necessary flexibility to meet organizational needs, this job description may be modified from time to time.

Employee Signature

Date