HR Toolkit™
FOR SMALL BUSINESS & HR CONSULTANTS

Date completed/revised: DD/MM/YYYY

Position Details

Title	Controller
Reports To	Insert title, not individual's name
Department	Finance
Position Status	☐ Employee ☐ Contractor ☐ Consultant ☐ Full-Time ☐ Part-Time ☐ On-going ☐ Term Term End Date (if applicable): DD/MM/YYYY
Eligible for Benefits	☐ Yes ☐ No Comments if applicable
Overtime Exemption Status	☐ Exempt ☐ Non-Exempt
Variable Compensation	☐ Bonus ☐ Commission ☐ Shift Premium ☐ Car Allowance ☐ Not applicable
Hours per Week	Insert actual expected hours of work per week, excluding breaks or lunch/week
Location	
Job Classification	CUSTOMIZER: If classifications have been established, insert job categories. Below shows an example. Otherwise, delete this row ☐ Clerical ☐ Administrator ☐ Coordinator ☐ Manager ☐ Director ☐ VP
Salary Range	Insert salary range, or insert: "As per Job Classification"
Direct Reports	As of DD/MM/YYYY but subject to change, position is responsible for Insert number direct reports, as follows: • Title. Insert additional bullets as required ☐ Not Applicable

This template is included in the ConnectsUs HR™ Toolkits.

HRToolkit™
FOR SMALL BUSINESS

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FOR HR CONSULTANTS

Set up your HR Department	Create HR for Clients

A complete HR Toolkit for small business to create and maintain your HR fundamentals.

Create your HR materials

- 260+ premium templates to create contracts, employee manuals, forms, spreadsheets and manager guides

- Download your HR folders

- Identify your HR priorities

- 22 HR topics

- Create HR intranet

Support your HR Function

- COVID-19 Portal

- Legislation Portal

- Remote Workforce Portal

- Mental Health Portal

- Diversity & Inclusion Portal

- Weekly updates, email notifications

- Help & support. With real humans!

HR Toolkit for Small Business, but made for HR consultants with the following differences:

- Special licensing for use with clients

- Additional module + additional download of pre-assembled folders and templates to create your own master HR toolkit to re-use for new clients

- Pricing.

    c.   Manages the accounting operations of subsidiary corporations.

    d.   Maintains a documented system of accounting policies and procedures.

    e.   Manages outsourced functions such as IT and auditors.

2. **Transactions** **Example 20%**

    a.   Overall responsibility for ensuring optimal performance for accounts payable, accounts receivable, payroll, financial reporting, taxation.

    b.   Maintains a system of controls over accounting transactions.

    c.   Preserves an efficient accounting filing system.

    d.   Preserves a directory of executed contractual documents.

3. **Reporting** **Example 20%**

    a.   Manages the production of the annual budget and forecasts.

    b.   Organizes a system of management cost reports.

    c.   Provides financial analysis as needed, for contract negotiations, pricing decisions, and capital investments.

    d.   Recommends benchmarks against which to measure the performance of Company operations.

    e.   Directs the preparation of the corporate annual report.

4. **Compliance** **Example 20%**

    a.   Provides information to external auditors for the annual audit.

    b.   Complies with regulatory requirements

    c.   Monitors debt levels and compliance with debt covenants.

5. **Human Resources** **Example 20%**

    a.   Provides HR contractual support for the organization and creates employment contracts, processes terminations, and maintains and enforces general employment policies and procedures.

    b.   Manages time tracking systems.

Job-Related Technical Skills

Skills	Proficient	Experience with	Familiar with
Computer skills, specifically Excel	x		
Human Resources		x	

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Experience/Education/Training	Required	Preferred
Certified Public Accountant (CPA) designation		x
Certified Management Accountant (CMA) designation		x

Position Success Traits

BUSINESS ACUMEN

- Understands the business we are in and key business drivers for performance.
- Operates with best-in-breed business practices.
- Uses sound commercial principles and viability in all areas of responsibility.
- Applies and balances information about business drivers and trends such as revenue, costs, customer needs, and short and long-term strategies to guide activities.

FINANCIAL MANAGEMENT

- Understands the Company is in business to make a profit.
- Uses quantitative information to monitor operations and make strategically-based decisions.
- Establishes and adheres to realistic budgets and analyzes variances for immediate action.
- Demonstrates fiscal responsibility and gets the best value and return on investment for the Company.
- Spends funds on initiatives that are the most strategically aligned with, and provide the strongest business case for the Company.
- Adheres to headcount and workforce ceilings.
- Makes and supports decisions in line with the Company's financial health, including adjusting resource levels.

PERFORMANCE MANAGEMENT

- Sets clear performance standards and objectives.
- Monitors and measures performance.
- Coaches and develops the capacity for staff to perform.
- Conducts performance reviews.
- When necessary, demonstrates the ability to make difficult staffing decisions and/or implements performance improvement plans.
- Recognizes, celebrates, and rewards successes.

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PROBLEM SOLVING

◆ Assesses challenges to identify causes.

◆ Gathers and processes relevant information.

◆ Generates creative solutions and finds a way to make it work.

◆ Makes recommendations and/or resolves the situation.

◆ Acknowledges when one doesn't know something and takes steps to find the answer.

Other/Comments

Insert any additional information here, if required. Delete this section if not needed.

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