

# Job Profile

<b>Job Title</b>	Business Operations Manager
<b>FLSA Status</b>	Salaried/Exempt
<b>Hours/Schedule</b>	Monday through Friday, 40 hours per week on site at the office in Hartland, WI. Start time is between 7:30 and 8:00 am, end time depends on lunch schedule, but is generally between 3:30 pm and 5:00 pm. Occasional virtual work is available, but not on a consistent schedule.
<b>Date Updated</b>	July 24, 2024
<b>Supervisor Title</b>	inVantage CEO
<b>Location</b>	Waukesha County, WI/Metro Milwaukee area
<b>Travel</b>	Occasional/<5%
<b>Essential Duties and Responsibilities</b>  <i>What do the BEST performers do in this role?</i>	<p>The Business Operations Manager role exists to make the running of an entrepreneurial Business coaching firm smooth and effective while creating an incredible client experience.</p> <p>The Business Operations Manager must be able to work magic by being incredibly organized and planful. Time management and the ability to drive projects forward will be a key to success, as will communication and proactivity. At inVantage we believe in providing “Unreasonable Hospitality” for our team and clients. This approach provides the most incredible experience with us and is most important above all else.</p> <p><b>Supporting inVantage:</b></p> <p><b>Sessions and Coaching Support:</b></p> <ul style="list-style-type: none"> <li>• Ultimately is the “right arm” to the Guides (coaches) providing the sessions for clients.</li> <li>• Preparation for and coordination of for client sessions – materials, agendas, client invitations and communications. Accuracy and preparedness is top priority to ensure exceptional client experience.</li> <li>• Session/event scheduling and venue location management.</li> <li>• Post session follow up to create clear expectations.</li> <li>• Updating and helping design tools used in our sessions. Will require use of a design tool such as Canva.</li> <li>• Become an expert on business operating system software used by clients (ninety.io). Conduct client onboarding and training, as well as support as issues arise in the system.</li> </ul> <p><b>Marketing:</b></p> <ul style="list-style-type: none"> <li>• Materials preparation for business development meetings.</li> <li>• Manage the marketing calendar of events and topics, coordinating with the Guides for input and drafting various marketing materials.</li> <li>• Marketing and Social Media management; writing content and managing activity. Must have good writing skills.</li> <li>• HubSpot CRM management (training available).</li> <li>• Speaking engagement identification, preparation and coordination.</li> </ul>

***Operations and Projects:***

- Overall office management – keeping it running smoothly, which includes all facets of facility management, supplies, equipment, vendors, aesthetics, etc. Our office space is shared with another company owned by the CEO’s husband, so we have a collaborative environment and team with both companies.
- We look for technology enabled processes, so the need for technical aptitude and interest is critical.
- The Manager will coordinate catering and snacks that provides a high quality food and beverage client experience.
- Managing the assessment process (DiSC, Five Behaviors of a Team, Working Genius, EQi, etc.).
- Special projects as they emerge – we always are getting better and we actively think with a continues improvement mindset.

***Being Part of the Team:***

- This role is the glue that holds the group together, and helps us all deliver amazing results to our clients. We operate with a “help first” approach to each other always. The right candidate for this role relishes in serving others to help them have a better day and be more effective.
- We celebrate our individual and group wins; help us make sure we do this well!
- Be well versed in the range of services and how to communicate with current and prospective clients about those services; Be able to articulate clearly what inVantage does in its market space (e.g. elevator speech).
- Seek out opportunities for improvement and efficiency – anticipate what needs to be done before assigned, see things through to completion accurately.
- Run a variety of errands as needed; some may be personal for the business Guides.

**Core Values Alignment**

***inVantage Purpose:*** We create the environment for business owners and leaders to live the benefits of delivering on their vision.

***inVantage Core Values:***

- **LIVE FULLY AND TACKLE THE CLIMB** - If you don’t try, you can’t fail. But you also can’t succeed.
- **BENEVOLENT CONNECTORS OF PEOPLE** - Great people need to be surrounded by other great people.
- **ABUNDANCE MINDED** - We share our resources, experience, wisdom and networks freely.
- **SAY IT, DO IT** - Credibility and confidence that we will get it done. Done *done*.

***General Characteristics for Success***

- Exceptional attention to detail.
- Meet deadlines; ability to see things through to completion without reminders. This results in no micromanaging and flexibility.

	<ul style="list-style-type: none"> <li>• Ability to handle multiple competing priorities and remain calm and effective under pressure.</li> <li>• Demonstrated service-oriented approach; motivated by providing solutions and impacting the success of others.</li> <li>• Commitment to professionalism and ethics; respect for everyone and the confidentiality imbedded in the business.</li> <li>• Interpersonal skills - ability to build rapport and interface with a diverse group of people quickly and easily.</li> <li>• Intuitive and creative problem solver with the ability to assess individual skills and background; resourceful, creative and flexible thinker; be able to be somewhat self-directed knowing what needs to be done.</li> <li>• Strong communication skills (both written and verbal), listening and persuasion skills - credible persona.</li> <li>• Decisive personality - Ability to set priorities and take action quickly and effectively without over or under analyzing resource allocation options.</li> <li>• Operationally oriented; always looking for a better way to accomplish tasks. Continuous improvement is valued.</li> <li>• Reliable in schedule and time management.</li> <li>• Ability to receive feedback for development; demonstrate a growth mindset.</li> <li>• Able to give feedback to colleagues.</li> </ul>
<b>Supervisory Duties</b>	N/A
<b>Organizational Interfaces</b> <i>Who do they work with</i>	<ul style="list-style-type: none"> <li>• The Business Operations Manager reports directly to the CEO of inVantage. This role will interact clients both in a sales/marketing capacity and in a client support role related to specific projects.</li> </ul>
<b>Education and Work Experience</b>	<ul style="list-style-type: none"> <li>• Bachelor's Degree desired.</li> <li>• 3+ years of business experience preferred.</li> <li>• Technologically adept with an advanced working proficiency of the Microsoft Office Suite (PowerPoint, Excel, Word, OneNote, Outlook). We work with these constantly.</li> <li>• Adept at learning new technology and systems, including financial systems, CRM's, HR systems and other tools used in the businesses.</li> </ul>
<b>Work Environment and Physical Demands</b>	<ul style="list-style-type: none"> <li>• General office environment. Work is sometimes performed remotely at client's office/facility or at an event site.</li> <li>• Physical demands may require delivering equipment and supplies to various sites; may have to lift boxes and other materials for delivery.</li> <li>• Valid driver's license and safe record; provides own reliable vehicle, possess insurance.</li> </ul>
<b>What Makes This a Great Opportunity?</b>	<ul style="list-style-type: none"> <li>• Fun work environment.</li> <li>• High-quality clients.</li> <li>• Exposure to business management.</li> <li>• Learning how to run a business. Opportunities to learn new industries and business models.</li> <li>• Casual work environment.</li> <li>• Occasional virtual work arrangements available.</li> </ul>

	<ul style="list-style-type: none"><li>• Key role on the team – has as much opportunity to impact the business as one desires.</li><li>• Training and growth opportunities to level-up skills and learn.</li></ul>
<b>Benefits</b>	<ul style="list-style-type: none"><li>• 401(k) with Safe Harbor (no vesting) 3% match.</li><li>• Insurance premium stipend available.</li><li>• Incredible PTO program.</li><li>• Summer Hours – no Friday's from Memorial Day to Labor Day!</li><li>• Paid training and development – we support the desire to grow and learn.</li><li>• Access to company memberships to a variety of events and programs.</li></ul>