



DM HALL
CHARTERED SURVEYORS

POSITION PROFILE
Finance Director



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Established in 1897, DM Hall LLP is one of Scotland's leading firms of Chartered Surveyors with a network of offices across the country. Currently, DM Hall has 26 Partners and approximately 250 employees. In terms of financials, the business has generated consistent revenues and profits for a number of years, showing significant resilience even in times of economic volatility.

DM Hall has a network of 24 offices across Scotland covering every city and major town. The current footprint covers locations from Dumfries up to Inverness, with a concentration of offices in the Central Belt, but also with offices in more remote locations such as Oban, Elgin and Galashiels. Whilst organic growth and diversification across the current portfolio is an ongoing priority, there is also a strategic aim of developing the business into England.

From a leadership perspective, DM Hall is very stable with John McHugh (Managing Partner), Alan Gordon (Senior Partner) and five other fee-earning Partners on the main Management Committee, all of whom have been with the business for a number of years. The broader partner group is equally stable, though with a younger overall demographic, providing the business with sound succession planning options for the future.

The firm has over 120 fully qualified surveyors, specialising in the full spectrum of residential and commercial services, including property for sale and lease. Their ability to provide a high-quality range of property services, both residentially and commercially, is unrivalled. Specifically, DM Hall provides the full range of property valuation and condition services for homeowners, estate agents, solicitors, investors, lenders, etc. including, but not limited to:

- Independent home reports
- Mortgage valuations
- Building condition surveys
- Energy performance certificates (EPC) and energy advice
- Commercial property agency
- Business sales and valuations
- Legal searches and property services
- Land development and planning
- Property Management
- Rural property estate agency
- Architectural services

The quality of the offering at DM Hall is reflected in their excellent scores on Trustpilot of 4.8/5 with 88% of reviews being rated 5 star: <https://uk.trustpilot.com/review/dmhall.co.uk>

DM Hall is proud to support a broad range of community initiatives across Scotland. At present, almost all offices have local sponsorship initiatives in place supporting local golf clubs, kids football teams, swimming groups, dance groups, a bowling club....the list goes on! In addition, DM Hall is proud to have extended charity partnerships with both SAMH and CHSS. For the year ahead, charity partnerships will take the form of workplace training for DM Hall staff, the first of which took place just this week, with attendance and support from senior management.

To learn more about DM Hall, please visit them online at www.dmhall.co.uk



With the present incumbent stepping into retirement, DM Hall has a requirement to recruit a Finance Director. Reporting to the Senior Partner and Managing Partner, the Finance Director will lead an experienced finance team in the head office in Edinburgh, currently operating with eight staff covering the primary financial activities such as accounts preparation, transactional processing and credit control.

This is a key position and the successful candidate will play a critical role in ensuring the sound financial stewardship of the business and supporting strategic plans for future growth. With a younger Partner group in place, the focus going forward is on growth and on developing the business in England. As such, there is a requirement for a Finance Director capable of performing the role as it stands today but also in the future as the business scales in size and complexity.

DM Hall has been investing significantly into the other central functions, such as IT and HR, and view this appointment as an opportune time to bring new ideas and impetus to the finance department. In particular, it is envisaged that the new Finance Director will conduct a review of current systems, processes and training, identifying any areas where it may be possible to provide an improved service to the business and implementing solutions to maximise efficiencies.

The preference is for a proactive Finance Director who will drive improvements and change, whilst providing sound financial advice and mitigating potential risks. This would include focus on areas such as supporting commercial decision making, controlling operating costs, developing insightful management information and analysing investments into new markets and locations.

The Finance Director will be involved in advising the Management Committee and supporting stakeholders across the business; helping identify and develop strategies to maximise revenue and profit growth. As such, cultural fit and alignment with the established partnership team will be as important as ability to do the job, with the successful individual displaying ambition to grow with the business over time.





Job Title:	Finance Director
Reports to:	Senior Partner and Managing Partner
Location:	Head Office - Corstorphine Road in Edinburgh, with occasional travel to other offices

The Finance Director will be a key member of the Management Committee and responsible for the following key deliverables:

- Form a close working relationship with the Management Committee and broader Partner group, playing a key part in the sustainability and expansion of the business through sound financial stewardship
- Lead and own the finance strategy to help optimise the company's financial performance and commercial position
- Take overall control of the company's accounting function, ensuring all reporting and processing activities are carried out efficiently, accurately and on time
- Contribute fully to the development of company strategy across all areas of the business, challenging assumptions and decision-making as appropriate and providing financial analysis and guidance on all activities, plans, targets and business drivers
- Ensure that company financial systems are robust, compliant and support current activities and future growth (currently using Sage)
- Lead and develop the finance team, ensuring it is fit for purpose as the business grows
- Ongoing development of the monthly board pack including the preparation and presentation of financial information, value-added commentary, KPIs and analysis to help the Management Committee understand better and improve the performance of the business
- Responsibility for all statutory submissions in accordance with the relevant legislation
- Ensure robust budgeting processes are carried out and reviewed on ongoing basis
- Responsibility for the company cash management policies and performance
- Form opinion and evaluate impact of technical matters/disclosure and recommend appropriate policies to senior management
- Planning, overseeing and reviewing the preparation of monthly consolidated accounts and reports to the Management Committee
- Ensure the presence of robust financial controls and risk management frameworks
- Establish a high level of credibility and manage strong working relationships with external parties including customers, suppliers, bankers and advisors
- Ensure all Insurances are up to date and appropriate (e.g., Company insurance, Death in Service scheme, etc.)
- Overview of all payroll matters in conjunction with the outsource partner (RSM)
- Company Secretarial duties



DM Hall is a complex, dynamic company and the successful candidate will play a critical role in helping maintain a sustainable model while supporting opportunities that take the business into new markets. It is likely that the Finance Director will need to make improvements to the finance infrastructure, so experience of implementing systems, processes and reporting, whilst also developing the people to deliver to a consistently high standard, is essential.

It is of particular importance that the individual provides strong support and challenge to the Management Committee, and takes a pro-active approach to identifying improvements across the business.

It would be advantageous if candidates have a background in a related industry or from similar service business environments where there is a significant focus on customer experience. In addition, there is a desire to attract an individual from another mid-sized business environment where candidates are used to significant breadth of role and the culture of working in a privately owned company. However, above all is the requirement for the right fit for the business and its people, so applications are welcomed from individuals from a range of backgrounds.

First-class communication skills, strong commercial and strategic acumen, and an ability to manage a wide range of stakeholders are all essential in what is very much a people and relationship-led business.

A summary of the key candidate requirements is as follows:

Experience:

- An experienced finance professional with a proven track record of success within a similar, challenging role
- A background working in a fast paced, complex and, ideally, multi-office environment
- Experienced in working with a Board, building their confidence in the reporting, financial models and processes/controls
- Willing to take ownership for driving performance across the business, seeking involvement and engagement in all value drivers appropriately
- A strong relationship builder who will challenge and collaborate internally and externally
- Extremely strong commercial acumen with the skills to input positively into commercial contracts, customer/supplier relationships and any other drivers that can boost financial performance
- A good strategic thinker who can execute key decisions in a balanced way, effectively assessing the risk versus opportunity equation
- Experience of a mid-sized, privately owned businesses would be advantageous
- Experience within the property/surveying industry, or other related sectors, would be preferable but by no means essential



Qualifications

- Degree qualified with a strong academic track record
- Professionally qualified accountant (CA, ACCA, ACMA) with PQE commensurate with a role at this level of responsibility

Skills, Knowledge & Abilities:

- Knowledgeable in current accounting standards and any proposed changes that are applicable to the business
- Ability to prioritise and adapt to workload
- Strong analytical, organisational and decision-making skills
- Excellent communication and problem-solving skills with an ability to influence key members of senior management
- Excellent communication skills, both written and verbal
- Ability to assess and drive business improvement projects
- Excellent IT skills, with a proven track record in optimising finance systems

Other Key Characteristics & Behaviours:

- A natural leader who intuitively motivates teams
- High levels of drive and personal commitment to achieve success
- Remains calm when under pressure
- Commercially curious and relishes challenges
- Results driven with a respect for deadlines
- Anticipates stakeholder needs
- Not afraid to challenge the status quo and evaluate/present alternatives as required
- Strong team player
- A positive fit with the DM Hall culture, demonstrating excellent people skills and high levels of engagement and energy



An attractive financial package is available to the successful individual and will be commensurate with the background and experience required for the role.

For more information on remuneration please contact Mark Lewis at Livingston James

Contact details are as follows.
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The Recruitment Process

- First round interviews are with our retained advisors at Livingston James
- Final stages will involve meeting John McHugh (Managing Partner), Alan Gordon (Senior Partner) and other Partners on the Management Committee

