



JOB TITLE: Financial Planning Analyst (FP&A) – Business Partnering & Analysis

LOCATION: Bolton (Hybrid)

REPORTS TO: Finance Business Partner

ACCOUNTABLE TO: Head of FP&A

JOB PURPOSE:

To provide high-quality financial planning, analysis and reporting to the finance leadership and operational teams to drive business performance, foster understanding and support growth. Be a trusted and valued Finance Business Partner to senior management, providing strategic financial insight to drive growth.

KEY STAKEHOLDERS:

- Finance Director
- Managing Director
- CEO

KEY RESPONSIBILITIES:

Financial performance:

- Lead month-end reporting and analysis to Operational leaders, delivering clear and accurate financial results in a timely manner.
- Analyse monthly financial results prepared by the accounting team to highlight and comment on key variances to budget or forecast.
- Collaborate with and support stakeholders to understand, track and analyse site financial performance, building rapport and holding them accountable for budget targets.
- Ensure that financial KPIs for relevant divisions are clearly and accurately reported on, with key trends highlighted to support informed decision making.
- Communicate performance effectively and objectively to the business, challenging budget holders and fostering a culture of accountability.
- Manage and maintain the month-end query tracker, ensuring site leaders receive prompt and clear responses to aid their understanding of financial results.
- Continuously review and improve the reporting processes and analysis across the FP&A and wider Finance team where appropriate.
- Work closely with the Business Intelligence team to create and distribute financial results and scorecards through systems and automation.

Budget and Forecast:

- Lead the budgeting process for respective area, ensuring alignment to overall strategy and relevant analysis is provided in-line with strict Group timelines.
- Support the Finance Business Partners in the budgeting process across all areas of the Group, ensuring alignment to strict timelines and relevant analysis is adhered to.



- Maintain a budget and forecasting financial model to ensure consistency of data across all areas, including relevant KPIs.
- Support the Lead FP&A Analyst, Head of FP&A and Business Intelligence team in implementing system-driven automation for reporting, budgeting and modelling tools.

Customer service:

- Build strong relationships with senior leaders and operational teams, including relevant department heads.
- Act as the main point of contact on behalf of the wider finance team for responding to queries raised directly to the job holder.
- Demonstrate strong financial business partnering skills by:
 - Providing timely delivery of monthly reports and scorecards (with support from the Business Intelligence team)
 - Offering training and guidance on financial awareness to key senior leaders in operational teams as needed.
- Model a positive, professional and collaborative ethos in the Finance team, fostering a supportive and productive work environment.

STANDARD RESPONSIBILITIES:

- There are a number of standard duties and responsibilities that all employees, irrespective of their role and level of seniority within OFG Group are expected to be familiar with and adhere to;
- Participates in an annual performance review programme
- Works, at all times, in accordance with the policies and procedures of the OFG Group and statutory regulations applicable to the Group.
- Observes, at all times, strict rules of confidentiality appropriate to the post.
- To comply at all times with the requirements of Health and Safety Regulations
- to ensure their own wellbeing and that of their colleagues.
- OFG Group is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults and expect all employees to work in accordance with this.
- Undertakes other duties as assigned.

MEASURES:

- Measures against set objectives relevant to the role
- Set performance indicators
- Departmental Net Promoter Scores



EXPERIENCE, SKILLS & QUALIFICATIONS:

ESSENTIAL

- Studying towards or completed a relevant accounting qualification (CIMA / ACCA / ACA etc.)
- A relevant degree (Accounting / Finance / Maths etc.) or AAT qualification.
- Advanced Excel skills are critical – data manipulation (including extraction from financial ledgers), analytical and presentation skills at a level suitable for Senior Manager review.
- Proven ability to influence financial outcomes and work closely with operational managers.
- Strong interpersonal and communication skills. Ability to communicate and build relationships with people at different levels.
- Ability to present complex data and analysis in a high impact visual manner to senior stakeholders, drawing out the key messages and findings.
- Relevant management accounting experience.
- Excellent working knowledge of Microsoft Office including PowerPoint.
- Experience of Access Dimensions and Power BI would be advantageous, though not essential.