



JOB TITLE: Financial Planning & Analysis Lead

LOCATION: Bolton (Hybrid)

REPORTS TO: Senior FP&A Manager

ACCOUNTABLE TO: Head of FP&A

JOB PURPOSE:

To lead the delivery of best in class financial planning, forecasting, analysis and performance reporting across the UK business. Acting as a trusted adviser to senior leadership, you'll provide meaningful insight, challenge and commercial support that drives strategic decision making, operational performance and sustainable growth.

This is a high impact role for a commercially minded FP&A professional who thrives on turning complex data into clear recommendations, leading planning processes and partnering with stakeholders across the business to improve financial outcomes.

KEY STAKEHOLDERS:

- Business Intelligence
- UK CFO
- Operational Directors
- Managing Director
- UK CEO
- Group Finance

KEY RESPONSIBILITIES:

Financial performance & Strategic Insight:

- Lead the production of financial reporting, performance analysis and management information for senior stakeholders, ensuring timely, accurate and insightful reporting.
- Deliver clear and compelling commentary on financial performance, identifying key risks, opportunities, trends and drivers of variance against budget, forecast and prior year.
- Provide actionable financial insight to support strategic decision making and operational excellence across the business.
- Develop robust financial models and scenario analysis to support growth initiatives, investment decisions and wider strategic projects.
- Challenge and influence operational and finance leaders on business performance, driving accountability and ownership of financial outcomes.
- Continuously enhance reporting, analysis and forecasting methodologies to improve efficiency, insight and decision making capability.
- Partner closely with the Business Intelligence team to develop automated reporting solutions, dashboards and scorecards that increase visibility and drive performance.



- Support the UK CFO, Head of FP&A and senior leadership team with high quality ad-hoc analysis and strategic financial support.

Budgeting, Forecasting & Planning:

- Own and lead the UK annual budgeting process, ensuring alignment to strategic priorities, operational plans and Group objectives.
- Drive the quarterly forecasting cycle, working collaboratively across Finance and Business Intelligence to improve accuracy, automation and efficiency.
- Maintain and evolve the business's financial planning model, ensuring the integrity, consistency and relevance of data, assumptions and key performance indicators.
- Monitor financial performance against plan, identifying emerging trends and recommending corrective actions where required.
- Drive continuous improvement in planning, forecasting and reporting processes through the effective use of systems, automation and data-led solutions.
- Support the development and implementation of new reporting and planning tools, working closely with the Head of FP&A and Business Intelligence teams.

Business Partnering & Stakeholder Management:

- Build strong, credible relationships with senior operational leaders, acting as a trusted financial adviser and strategic partner.
- Translate complex financial information into clear, meaningful insights that support informed decision-making.
- Serve as a key point of contact for financial planning, forecasting and performance-related queries across the business.
- Promote financial accountability by supporting leaders in understanding their performance, risks and opportunities against budget.
- Deliver financial training, guidance and coaching to non-financial stakeholders where required.
- Promote and drive a collaborative, high-performing culture within the Finance team, fostering continuous improvement, knowledge sharing and professional development.

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.

EXPERIENCE, SKILLS & QUALIFICATIONS:

ESSENTIAL

- Qualified accountant (ACA, ACCA, CIMA or equivalent) or qualified by experience with significant FP&A expertise.
- Demonstrable experience leading budgeting, forecasting and financial planning processes within a complex organisation.
- Advanced financial modelling and analytical capability, with the ability to translate data into commercial insight and recommendations.
- Strong commercial acumen with proven experience influencing senior stakeholders and driving performance improvement.
- Excellent communication and presentation skills, with the ability to present complex financial information in a clear, engaging and impactful way.
- Highly proficient in Excel, PowerPoint and financial reporting tools.
- Strong attention to detail combined with the ability to maintain a strategic, big-picture perspective.

DESIRABLE

- Experience with Planning Analytics, Cognos, Power BI, Tableau or similar reporting and planning platforms.
- Knowledge of financial systems, automation tools and data visualisation techniques.
- Experience supporting business transformation, system implementation or reporting automation initiatives.