

## POSITION DESCRIPTION

### Finance Transformation Manager

#### Purpose of Position

The Finance Transformation Manager is a key member of the Finance Leadership Team to support the business with better performance through enabling the finance function to drive greater efficiencies, optimise processes & provide greater levels of insight. The role will facilitate the development and delivery of finance functional strategy and lead projects and programmes to enable transformation in finance in service of better business and organisational outcomes.

Reporting to the CFO, the Finance Transformation Manager will work closely with the global finance team and business on key transformation and technology initiatives, through facilitating the strategic direction of the Finance function, delivering transformation initiatives, and driving outcomes. You will support and work closely with finance systems, internal control and IS Operational Excellence teams.

#### ROLE SPECIFICATIONS:

**Reports to:** Chief Financial Officer

**Department:** Finance

**Indirect Reporting:** N/A

#### Key Relationships:

**Internal:** ELT, Finance Team, IS Team, Business Unit Managers

**External:** Third party providers, system vendors, implementation partners, auditors

**Travel:** Required – occasional, international, and national

**Customer Engagement:** Occasional

**Budget Responsibility:** N/A

**Direct Reports:** Systems Accountant, Business Analysts, Data Analysts.

#### KEY POSITION RESPONSIBILITIES

Key Accountability	Outcomes/ Expectations
Project Management	<ul style="list-style-type: none"> <li>Lead projects from end to end, from requirements gathering, through to design, build, testing and implementation of proposed development changes with a</li> </ul>

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	<p>focus on identifying improvement opportunities and flagging issues/gaps.</p> <ul style="list-style-type: none"> <li>• Implement and oversee the delivery of finance transformation projects and effectively manage delivery team(s) to ensure successful project deliverables and outcomes (including facilitating effective change management)</li> <li>• Lead/facilitate PMO activities where required (particularly for system/technology related projects, including monitoring the overall project status, project objectives, project risks etc.</li> </ul>
<p>Business Process Improvements</p>	<ul style="list-style-type: none"> <li>• Identifying process improvements and initiatives leading to increased effective and efficiency of finance and business support activities.</li> <li>• Continuously monitoring internal processes and identifying industry trends and value creation opportunities to maximize the potential of the finance function</li> <li>• Understand how technology can be leveraged to enable the finance function to deliver decision support to all functions in Gallagher.</li> <li>• Support business case development and document the requirements (business and functional) to the level appropriate for the business cases being developed for system/process improvement.</li> <li>• Understand best practice for business systems and processes, and work with various functions (including IS – Operation Excellence team) in the business to implement process improvement.</li> </ul>
<p>Finance Strategy</p>	<ul style="list-style-type: none"> <li>• Facilitate the development of the strategy for finance (aligned to enterprise strategy) and be responsible for the creation and implementation of initiatives and programmes to transform finance</li> <li>• Keep up the pace with evolving technologies and industry trends, and bringing ideas and innovation to enable sustainable change for the finance function</li> <li>• Monitor, guide, and coach staff engaged in finance transformation projects and initiatives.</li> <li>• Benchmark performance of Gallagher against outside organisations to identify gaps and improvement opportunities.</li> <li>• Embed a continuous improvement culture through ensuring finance are equipped with the appropriate tools, systems, and methodologies</li> </ul>
<p>Finance Systems, Controls and Business Intelligence</p>	<ul style="list-style-type: none"> <li>• Working closely with the finance systems, internal control and IS teams to ensure the design and effectiveness of systems, processes and controls provide a strong and robust environment.</li> <li>• Work with IS and finance to leverage existing technology, new solutions including BI tools and data science capabilities to create better insights and increase levels of self-service.</li> <li>• Lead and support ERP transformation and system integration projects and programmes</li> <li>• Develop group capability around business intelligence and data science to enable finance to be better business partners and add greater value.</li> </ul>

Including any other duties not specified that may be required to complete the role, and as requested by the Reporting Manager.

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## PERSON SPECIFICATIONS

### Qualifications Required:

- Relevant Bachelor's degree or master's level degree
- CA, CPA and CIMA Qualified

### Experience Required:

- Experience in finance organisations or consulting, advising CFOs and Finance teams on finance transformation, process improvements, operating model change and other critical elements of the Finance function.
- Proven experience in leading or playing a key role in a finance transformation, finance change or development and execution of finance strategy.
- Experience in leading large teams and/or managing and coaching other team members or cross-functional teams

### Knowledge/Skills/Abilities Required:

- Adaptable, flexible, and able to succeed in a dynamic and changing environment
- Customer centric with a focus on financial accuracy, integrity, and service levels
- Strong stakeholder management, influencing and communication skills, who drives action
- ERP system implementation knowledge (SAP S4/HANA knowledge is preferable)
- Innovative and curious mindset with a proven record of process improvement
- Ability to lead and drive improvement projects and initiatives across an organisation
- Natural collaborator with ability to bring together diverse teams and perspectives
- Excellent verbal and written communication skills
- Problem solving and strategic thinking skills.
- Strong financial modelling skills, as well as business and data analysis skills
- Ability to work under pressure and deadlines.

### Knowledge/Skills/Abilities Desirable:

- Knowledge and experience with PowerBI and/or Workday Adaptive
- Experience in a fast-growing manufacturing and sales organisation with a global presence.
- Breadth of experience would be an advantage to ensure understanding of "best practice" business processes.

## ORGANISATIONAL STRUCTURE

<b>CEO &amp; Executive Director</b>
CFO



<b>Finance Transformation Manager</b>

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# Protect what matters most.

Our purpose and our values apply to our extended Gallagher family including our employees, customers, partners and community.

