

**Job Title:**

Financial Planning & Analysis Manager

**Position Summary:**

We are looking for an experienced and versatile hands-on Financial Planning & Analysis Manager to join our enthusiastic and entrepreneurial team. This manager will work across many functions (sales, marketing, operations and accounting) to provide insight and analysis to support great decision making and drive action. Responsibilities include but not limited to helping Sales and Marketing to manage their P&L budget forecast and actuals and provide insight into crucial areas including depletions, shipments, and pricing, as well as managing a robust S&OP process. The position will be responsible for

**Essential Duties:**

- Lead revenue forecasting and variance analysis process
- Create and update driver based financial forecast models used to budget Revenue, COGS, OPEX, with updates of key assumptions and financial impact analysis
- Create departmental OPEX forecasts by understanding spend drivers, risks, and opportunities
- Monitor throughout the month to land within targets, perform variance analysis, and determine root cause to fix issues
- Support monthly financial forecast presentation for executive staff
- Provide analysis of depletions, shipments, pricing, incentives, and promotions
- Develop and lead semiannual pricing review with Sales
- Lead the execution of the end-to-end S&OP process
- Manage the demand planning system and partner cross-functionally with Sales, Finance, and Marketing to establish an informed forecast (statistical forecast, rate of sale data, promotions)
- Create and modify the long-term (3 year) supply plan to help ensure continuity of supply across key appellation varietals and SKUs
- Develop people, processes and systems to drive continuous improvement
- Manage 1-2 analysts depending on experience
- Provide ad hoc analysis and reporting

**Qualifications:**

- Bachelor's degree
- 5-7 years of finance or related experience
- Strong analytical skills and ability to analyze complex data and derive meaning/insight
- Positive, proactive attitude
- Action-oriented with ability to complete assignments in timely manner and manage priorities
- Demonstrated ability to partner effectively cross functionally, sales team experience preferred
- Advanced Excel and PowerPoint skills
- Experience with large ERP and financial planning systems (NAV preferred)
- Self-motivated
- Strong organizational skills
- Excellent verbal and written communication skills
- Handles stressful situations and deadline pressures well
- Wine industry experience preferred

**Physical Demands:**

<b>Stand</b>	F	<b>Lift/Carry</b>	
<b>Walk</b>	F	10 lbs or Less	O
<b>Sit</b>	F	11 – 20 lbs	O
<b>Handling/Grasping (repetitive motions)</b>	O	21 – 50 lbs	O
<b>Reaching Above Shoulder</b>	O	51 – 100 lbs	R
<b>Reaching Outward</b>	O	Over 100 lbs	N
<b>Climb</b>	R	<b>Push/Pull</b>	
<b>Crawl</b>	R	12 lbs or Less	O
<b>Squat or Kneel</b>	R	13 – 25 lbs	O
<b>Bend</b>	R	26 – 40 lbs	O
<b>Working at the computer</b>	C	41 – 100 lbs	R
<b>Driving</b>	R	<b>Near Vision</b> (closer than arm's length)	C
<b>Respirator Use</b>	N	<b>Far Vision</b> (farther than arm's length)	C
<b>Other Personal Protective Equipment Use</b>	O	<b>Color Vision</b>	C

**Legend:**

<b>N</b> (Not Applicable)	Activity is not applicable to this occupation.
<b>R</b> (Rarely)	Occupation requires this activity several times a month (not daily)
<b>O</b> (Occasionally)	Occupation requires this activity up to 33% of the time (0-2.5hrs/day)
<b>F</b> (Frequently)	Occupation requires this activity from 33% - 66% of the time (2.5-5.5 hrs/day)
<b>C</b> (Constantly)	Occupation requires this activity more than 66% of the time (5.5+ hrs/day)

The above information is representative of the work performed in this position, however it is not all-inclusive. The omission of a specific duty or responsibility does not exclude it from the position if the work is similar or related to the essential duties and responsibilities. Other tasks may be assigned as needed.

**Reasonable Accommodations Statement:**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.