



Example of Planning / Forecasting Job Description

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Our company is hiring for a planning / forecasting. Please review the list of responsibilities and qualifications. While this is our ideal list, we will consider candidates that do not necessarily have all of the qualifications, but have sufficient experience and talent.

Responsibilities for planning / forecasting

- Own the baseline quarterly plan for our trading team
 - Manage personnel to provide direction, feedback, training & ensure assigned projects & tasks are completed accurately and within specified deadlines
 - Contribute to the selection of personnel & the development of the team
 - Develop monthly and balance of year forecast by working with functional teams to provide key inputs on sales, gross profit and operating expenses
 - Ensure rolling forecast process is timely, accurate and reflects latest perspective of financial performance
 - Key contributor to annual planning process by leading target setting (High level and field), key assumptions development and corporate departmental targets
 - Develop key tools to inform leadership how financial plan potentially drives EVA and other external metrics which correlate to share price
 - Lead multi-year and annual capital planning and forecasting process by working with functions to ensure appropriate levels of capital to manage base business and support new initiatives
 - Provide leadership and coaching for 0-6 direct reports by modeling appropriate leadership techniques, providing employee feedback through effective performance management practices, ensuring employee skill and leadership development, and conducting regular one-on-one meetings
 - Provide budget modelling and forecast processes
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- Ability to present business conclusions to Senior Management
- 5+ years of investment banking / consulting / corporate finance / operational FP&A or related experience
- Ability to manage workflow within a constantly changing environment
- Demonstrates accountability and responsibility
- Ability to lead and facilitate communication between cross-functional teams on projects, day-to-day operations
- Proactive and skilled in anticipating, troubleshooting and solving problems