



Financial Analyst

Title: Financial Analyst

Business Unit: Corporate Services Division

Department: Accounting and Finance

Reports to: Manager, Financial Planning & Analysis

Classification: Exempt

Summary of the Job

Reporting to the Manager, Financial Planning & Analysis, the Financial Analyst will play a critical role in supporting the annual financial plan process, forecast process, and monthly reporting process, providing relevant data and metrics across the organization. The result of these efforts and related analysis is to enable optimal and informed decision making, risk mitigation, and to exploit opportunities, while raising the overall business acumen of the entire DWA enterprise.

The Financial Analyst will participate as a member of the Financial Planning & Analysis team, and is accountable for all analytics, driving financial views, and supporting the enterprise in similar pursuit.

Essential Functions

Financial Planning

- Participate in the annual plan process, engaging the relevant BU's to develop revenue and expense outlooks while leveraging planning software
- Leverage Profit and Loss Statement (P&Ls), Balance Sheet, Cash Flow Statement, Capital Plan, Headcount, and related Capacity/Utilization (merging of financial and operational assumptions)
- Support efforts in developing related presentations (internal & external)

Monthly Reporting

- Partner with Accounting in the month-end close process, and ensure planning software is aligned with the General Ledger (G/L)
- Develop robust managerial financial statements and related presentations
- Provide support in the creation of financial presentations for meetings with business unit leaders, to provide insights, trends, consult, and direction
- Support continued evolution of reports, including Agency P&Ls, Business Unit P&Ls, and Client Gross Margin reports
- Ensure Standard Operating Procedures are documented and maintained for all standard reports, while working to continuously improve reports and metrics as the business requires

Forecasting

- Support a mid-year forecast process and cadence; P&L, Balance Sheet, Cash Flow Statement, Capital Plan, Headcount, and related utilization assumptions
- Continue ongoing development of labor metrics to facilitate workforce planning
- Develop and employ forward-looking models and activity-based analyses to provide financial insights and trends

Maintain/leverage planning tool

- Support efforts to ensure data integrity in Budget Maestro
- Employ Budget Maestro to leverage reporting capabilities and house plan and forecast scenarios
- Includes connectivity with WMJ G/L and related ongoing implementation

Business Partner

- Support Controller/Accounting to ensure plan/forecast and actuals are aligned
- Support Operations in calibrating and bringing insights into capacity, utilization, and pricing



- Support HR in execution of variable pay, merit, and promotion activities
- Work across the organization, including upper management, to understand and accommodate needs
- Act as financial liaison to assigned Business Units, with expectation to raise the collective financial acumen, contributing to the development of a “profitability culture”

Ad Hoc Analysis

- Conduct capital assessment and tracking (ROI)
- Continue efforts in support of developing and tracking KPIs
- Ensure debt covenant compliance
- Participate in analysis of business initiatives and/or new services
- Lead “lease vs. buy” analysis

Education and Experience

- BA in Finance/Accounting/Economics/Math required
- Minimum 2 years in Finance/Accounting
- Advanced Excel skills, financial systems experience and aptitude
- Previous experience with financial forecasting, analytics, and modeling preferred
- Tech-savvy mindset with strong ability to come up to speed quickly on finance and accounting systems
- Demonstrated success partnering with Accounting and forming strategic partnerships across an organization

Competencies

- Behaviors and qualities of a professional and a lifelong commitment to professional development as demonstrated by a strong ability to manage time, work in a collaborative way, adapt to change, act in a professional manner, manage stress, and demonstrate a service orientation.
- A commitment to conducting business according to the highest ethical standards as demonstrated by a excellent knowledge of industry legal compliance guidelines, organizational ethics, and demonstration of personal ethics and integrity.
- Ability to communicate effectively as demonstrated by advanced_level verbal skills, writing skills, presentation skills, and an excellent ability to influence and impact others through meaningful and persuasive delivery.
- Vision and Innovation as displayed by a strong ability to think critically, think creatively, engage in visioning, and approach business opportunities in an enterprising way.