



WILLIAM GRANT & SONS

ROLE PROFILE

Job Title	Plan to Perform Workstream Manager
Business Unit / Group Function	Finance
BU Team / Sub-Function	Group Financial Control
Location	Arete
Team Leader	Plan to Perform Workstream Lead
Team Members	No
Job Level	4A
Role Purpose	
Provide direct support to the Plan to Perform Workstream Lead to enable the design and execution of the Plan to Perform initiatives in support of Finance programmes (including our Finance Transformation programme and IFS Cloud). Ensuring robust delivery of workstream outputs and stakeholder alignment across all plan to perform process, including budgeting and forecasting, to drive efficiencies, effectiveness and process standardisation.	
Accountabilities	
• Support the design of the target operating model for budgeting and forecasting processes by coordinating inputs, documenting requirements and ensuring finance stakeholder engagement is effective and timely. • Support the definition and maintenance of the Plan to Perform process taxonomy and ensure alignment with the William Grant Way, including capturing agreed standards and keeping documentation current. • Coordinate workstream activity to deliver agreed initiatives and outputs, translating workstream aims into clear deliverables, actions and timelines and driving completion through disciplined follow-up. • Support the vision and requirements for tools and applications needed to enable the target operating model, coordinating user requirements, impacts and readiness considerations with relevant stakeholders. • Support the synthesis of Activity Analysis outputs relevant to Plan to Perform tasks to help establish baseline activity/cost understanding and inform prioritisation of process and change opportunities. • Identify, track and support resolution of workstream dependencies, risks and issues, escalating to the Workstream Lead where required to protect delivery of workstream objectives. • Support the Workstream Lead's SME responsibilities for the IFS rollout programme by coordinating Plan to Perform process inputs and ensuring standardised ways of working are reflected in workstream deliverables. • Support the development of standardised Plan to Perform KPIs by coordinating definitions, data inputs, ownership and measurement approach across all sites.	



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- Support change management and communications for Plan to Perform initiatives, ensuring stakeholders receive clear, timely updates and that engagement actions are completed.
- Build effective cross-functional relationships across Finance and relevant stakeholders to ensure consistent adoption of agreed Plan to Perform standards and continuous improvement opportunities are captured and progressed.

Skills / Experience / Capabilities

- Demonstrable experience operating within complex finance transformation, operating model redesign or business change programmes, ideally across planning, budgeting and forecasting processes.
- Strong knowledge of Plan to Perform processes, with the ability to shape requirements, challenge constructively and translate strategic objectives into clear, actionable deliverables.
- Track record of leading cross-functional coordination across multiple stakeholder groups, balancing competing priorities and driving momentum across interdependent workstream activity.
- Strong analytical capability, with the judgement to interpret data, identify material themes and support robust, insight-led decision making.
- Highly effective communicator with the credibility to engage, influence and build alignment across Finance, programme leadership and wider business stakeholders.
- Experience working with process documentation, governance artefacts, KPI frameworks and technology-enabled change to support the delivery of sustainable business outcomes.
- Highly organised and delivery-focused, with strong attention to detail and the ability to manage actions, dependencies, risks and outputs with discipline and pace.

Created by:	Martin Purkess
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