



WILLIAM GRANT & SONS

ROLE PROFILE

Role Title	Business Process Analyst – Plan to Perform Workstream
Business Unit / Group Function	Central Services
BU Team / Sub-Function	Finance
Location	Arete
Team Leader Role	Plan to Perform Workstream Lead
Role Level	4B
Team Members	No
Role Purpose Provide high-quality analytical and delivery support to the Plan to Perform Workstream Lead and Plan to Perform Workstream Manager in shaping and delivering the Plan to Perform workstream. Acting as a process improvement specialist, the role will support the design, standardisation and improvement of end-to-end budgeting, forecasting and performance management processes to enable a more efficient, consistent and insight-led planning model. The role will draw on strong finance transformation experience and methodologies such as LEAN to identify improvement opportunities, shape robust workstream outputs and support delivery aligned to our Finance Transformation programme objectives and wider Finance transformation priorities.	
Accountabilities • Support design and delivery of the Plan to Perform workstream, coordinating inputs, maintaining momentum and enabling effective stakeholder engagement. • Support definition and maintenance of the Plan to Perform process taxonomy, operating principles and service expectations, ensuring process scope, responsibilities and hand-offs are clearly articulated and aligned to the William Grant Way. • Lead detailed analysis to identify improvement and standardisation opportunities across the end-to-end Plan to Perform scope, applying LEAN or similar techniques to reduce non value-added activity, simplify processes and improve efficiency. • Support root cause analysis and continuous improvement activity to strengthen planning effectiveness, process consistency and cycle time. • Support documentation and design activity across key Plan to Perform processes, including budgeting, forecasting, performance management and related reporting activity. • Support development of Plan to Perform workstream outputs, including process requirements, KPI definitions, reporting requirements and governance materials, to enable effective performance management and delivery oversight. • Drive agreed actions and support delivery through detailed design, execution, go-live and business as usual handover. • Identify, track and support resolution of workstream risks, issues and dependencies, including alignment with IFS rollout activity and adjacent finance processes. • Support requirements and readiness activity for enabling planning tools, reporting solutions and workflow requirements needed to support the future Plan to Perform operating model.	



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- Prepare high-quality materials and updates to support governance discussions, decision-making, stakeholder communication and change activity.

Skills / Experience / Capabilities

- Experience in business process analysis, process improvement and workstream delivery within a Finance, Plan to Perform or transformation environment.
- Demonstrable process improvement expertise, including application of LEAN or similar methodologies to standardisation, root cause analysis, waste elimination and cycle time improvement.
- Strong finance transformation and project or programme delivery experience, ideally in complex change environments.
- Strong understanding of core Plan to Perform processes, including budgeting, forecasting, performance management and planning-related reporting.
- Strong analytical, documentation and problem-solving capability, with the ability to translate insight into clear, practical outputs.
- Strong planning, organisation, stakeholder engagement and communication skills, with the ability to work effectively across Finance and cross-functional teams.
- Proficient in Microsoft Office applications, particularly Excel, PowerPoint and Word, and comfortable operating in a fast-paced change environment.

Created by:	Martin Purkess
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Creation Date:	27 May 2026
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HRBP:	Kirsty Morris
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