



Position: Financial Planning Analyst
Department: Financial Planning and Analysis
Reports To: Financial Planning and Analysis Manager
Supervises: None
Job Group: Professionals
Exempt or Non-Exempt: Exempt

Job Description:

The Financial Planning Analyst will act as a primary consultant, tasked with providing timely insight related to business results and trends while being on the leading edge of identifying future opportunities. This position will be responsible for performing financial planning and modeling along with facilitating the budgeting process for various areas of the company by working collaboratively with field management on their strategic business plans.

At RDO Equipment Co., we make decisions thoughtfully, balancing the impact on each of our stakeholders, and enact those decisions according to each of our core values. In this way, we find purpose in our work and pride in our purpose.

Specific Duties Include:

- Oversees assigned field operation's budgeting and business planning. This includes:
 - Providing expertise in the development and refinement of a perpetual budgeting process by preparing forecasts and budgets, analyzing trends in revenue, costs, expenses and other related areas.
 - Analyzes actual results to understand budget variances and revise projections as appropriate.
 - Analysis of and recommendations on key performance indicators and their influence on financial results and long-term initiatives.
 - Consulting General Managers in creation and refinement of action plans.
- Prepares regular financial analysis for assigned regions/stores. This includes:
 - Specific analysis of a business function, department, store or region as directed and by self-identification of business information needs.
 - Researches, analyzes and synthesizes data from the Company's numerous data resources.
 - Interpreting financial and operational reports and effectively articulating actionable information to field management.
- Assists in streamlining processes and reporting related to business planning, performance and efficiency improvement.
- Builds a great working relationship with General Managers to be viewed as a valued partner.
- Consults management monthly in the development and progress of action plans which have resulted from the financial planning and analysis activities.

- Ensures timely delivery of information to all relevant stakeholders. This includes providing tracking of results related to action plans, stakeholder scorecard and various other key metric reports.
- Facilitate and partner with Field Leadership on the development of capital investment and long-range plan models as needed.
- Assists in creation of various Company sponsored bonus plan criteria that aligns with regional and organizational objectives.
- Develops relationships with the appropriate original equipment manufacturers (OEM).
- Provides tracking and communication related to OEM sponsored marketing and incentive programs in conjunction the marketing department.
- Provides all other ad hoc analysis as assigned.
- Assists other department personnel to ensure customer satisfaction.
- Follow all safety rules and regulations while performing work assignments and adhere to all policies and procedures as specified in company manuals and as directed in the employee handbook.
- Conduct self in the presence of customers and community to present a professional image of RDO Equipment Co.
- Proactively seek and participate in available company-sponsored training, to develop and advance knowledge base and skill set.
- Participate in all company/location driven communication efforts, including open book meetings, huddles, department meetings and other related efforts.
- Maintain a positive and professional working relationship with peers, management, and support resources, with a constant commitment to teamwork and exemplary customer service.
- Perform all other duties as assigned by management in a professional and efficient manner.

Job Requirements:

- Bachelors degree in Accounting/Finance/Business
- Minimum of 2-3 years of work-related experience in an applicable field
- Must be a self-starter who can work with limited oversight
- Motivated by continuous improvement
- Familiar with standard finance concepts, practices, and procedures
- Attention to details in conjunction with the ability to see the bigger picture
- Possess excellent analytical skills and relies on experience and judgment to plan and accomplish goals
- Strong problem-solving skills with the ability to communicate effectively with others and being resourceful in solving problems independently
- Information seeking skills and drive to make things happen
- Excellent computer skills including strong Microsoft Excel skills
- Excellent customer service skills
- Excellent oral and written communication skills
- Ability to travel up to 25%
- Candidates must have valid work authorization and be able to work in the U.S. without company sponsorship

Essential Job Functions:

Activity	Never	Occasionally	Frequently	Constantly
Hours Per Day	0 Hours	Up to 3 hours per day	3-6 hours per day	6-8+ hours
Sitting				X
Walking		X		
Standing		X		
Bending (neck)			X	
Bending (waist)		X		
Squatting	X			
Climbing	X			
Kneeling	X			
Crawling	X			
Twisting (neck)		X		
Twisting (waist)		X		
Hand Use: Dominant Hand Right ___ Left ___				
Is repetitive use of hand required?		X		
Simple Grasping		X		
Power Grasping	X			
Fine Manipulation	X			
Pushing/Pulling		X		
Reaching (above shoulder level)		X		
Reaching (below shoulder level)		X		
Lifting:				
0-10 lbs.			X	
11-25 lbs.	X			
26-50 lbs.	X			
51-75 lbs.	X			
76-100 lbs.	X			
Carrying:				
0-10 lbs.			X	
11-25 lbs.	X			
26-50 lbs.	X			
51-75 lbs.	X			
76-100 lbs.	X			
Driving cars, trucks, forklifts, other equipment?	X			