

Head of Corporate Financial Planning & Analysis (FP&A)

Description

We are HALO! We connect people and brands to create unforgettable, meaningful, and lasting experiences that build brand engagement and loyalty for our over 60,000 clients globally. HALO has grown exponentially over the past few years to \$800 Million in 2021, over 2,000 employees, 1,100 Account Executives and 40+ sales offices across the United States. HALO is the global leader of our \$25B industry.

This is a hybrid role. *Must be within driving distance of Oakbrook Terrace, Illinois for occasional in-office connections*

We're looking for a **Head of Corporate Financial Planning & Analysis (FP&A)** to own HALO's corporate financial model including developing, implementing, and managing all necessary financials to support the operating plan, strategic initiatives, multi-year business plans, M&A opportunities and sensitivity analysis. This individual will be responsible for budgeting, forecasting, reporting, cost optimization and workforce planning in partnership with functional leaders. They will bring fresh insights, a business mindset and help us scale more efficiently to support the functional areas.

Responsibilities

- Working closely with the leadership team to formulate the business's medium to long term financial and strategic plan
- Communicating results and recommendations to senior management for improvements that will lead to revenue generation, margin improvements, cost reduction and streamlining operations
- Lead and execute on an efficient budgeting and forecasting processes which while capturing the inputs of various stakeholders drive for achieving company goals.
- Analyze financial and operational results to better understand company performance and enable an effective communication of the same to senior leadership and investors
- Partner with Business FP&A, Program Leadership and Business Units to conduct monthly P&L reviews with Program Leadership to discuss results, identify gaps, and implement mitigation strategies.
- Establish a detailed understanding of how revenue and costs are allocated and identify and implement opportunities to improve the financial reporting.
- Manage the capital expenditure process for ROI / DCF analysis, approvals and tracking of it
- Work closely with Business FP&A and business units to drive margins expansion, and HR for FTE and Commission effectiveness
- Manage and build out the FP&A team as the business grows.
- Work with department heads to inform, plan, and manage their cost center budgets and actual expenses. A business partner to COO, CHRO and other functional leaders.
- Develop, report, and automate financial reporting and KPI dashboards to provide management with forecast insights, performance metrics and financial analytics for improved organizational decision-making.
- Work with the CFO, Financial Controllers and Business FP&A Lead to ensure data integrity and consistency in data across the company (across various sources).
- Partner with accounting, tax and corporate to develop entity level forecasting models and continuous improvement to the timelines of internal reporting.
- Embodies HALO's values by acting as One HALO team, with ingenuity, determination and in an expansively inclusive manner.

- Ad hoc reporting and special projects.

Requirements

- Degree in Finance or Accounting.
- 15 years of experience in Corporate FP&A with a mid to large size organization.
- Proactive, effective communicator that has demonstrated success with Senior Management and Business partners in achieving desired results in a fast paced, rapidly growing environment.
- Self-motivated with high bias for action and accountability.
- Ability to synthesize, organize and maintain large amounts of data.
- Proficient in cash flow, balance sheet, income statement preparation and interpretation.
- A good understanding of general accounting principles (US GAAP).
- Experience with ERP and Business Intelligence Systems is required. Direct experience with Infor/M3 and Planful is a plus but not required.
- Naturally curious, comfortable with ambiguity and enjoy working in a fast-paced environment
- A strong team leader who while being hands on, delegates effectively, and develop a strong bench of finance leaders

Preferred qualifications

- MBA, CPA or CMA, CFA

More about HALO

HALO is the global leader in branded merchandise, uniform programs, and recognition and incentive solutions. We partner with our clients to break through the clutter of our media saturated world and connect their brands to customers, employees and other audiences critical to their success. As a team member you can expect a positive culture of ingenuity, inclusion, and relentless determination. We also offer:

- **Career Advancement:** At HALO, we love promoting from within. Internal promotions is the key to our exponential growth in the last few years. With so many industry leaders at HALO, you'll have the opportunity to accelerate your career by learning from their experience, insights, and skills and gain access to HALO's influential global network, leadership experiences, and diverse thinking.
- **Culture:** We love working here and know that you will too. You can expect a positive culture of *ingenuity, inclusion, and relentless determination*. We push the limits of possibilities and imagination by staying curious, humble, and provocative in order to break through yesterday's limit. Diversity is the source of our creativity and we thrive when each of contributes to an inclusive culture of respect, dignity, and equity mindset in everything we do. We keep our promise for excellence with an unrelenting commitment to achieving results and supporting one another to stay accountable, transparent, and dependable.
- **Recognition:** You're going to succeed here, and you can count on us to celebrate your wins. Colleagues across the company will join in recognizing your big milestones and nominate you for awards. Over time, you'll earn so much recognition that you can convert into gift cards, trips, concerts, and merchandise at your favorite brands.
- **Flexibility:** Most roles offer hybrid work. In addition, we pride ourselves on flexible schedules that help you find a balance between professional and personal demands. We believe that

supporting our customers is the priority and trust that you and your manager will find a schedule to achieve that priority.

- **Work with your favorite brands:** HALO clients include over 100 of the Fortune 500 as well as thousands of mid and small-size organizations. You'll be on teams that are focused on the future of our industry and bringing our customers fresh ideas that are first-in-the-world.
- **Stay well at HALO:** At HALO, we have benefits that support all parts of your life and to find a work-life balance custom to you. *We offer easily accessible mental healthcare for you and your family. HALO has multiple programs to help with life's challenges.* Our program focuses on behavioral health coaching, therapy and psychiatry, personalized skill development, and providing access to care for your dependents. In addition, we offer *nation-wide coverage* Medical, Dental, Vision, Life and Disability insurance, and additional Voluntary Benefits. Prepare your financial future with our 401K Retirement Savings Plan, Health Savings Accounts (HSA), and Flexible Spending Accounts (FSA).

HALO is an equal opportunity employer. We celebrate diversity and are committed to creating an inclusive environment for all employees. We insist on an environment of mutual respect where equal employment opportunities are available to all applicants without regard to race, color, religion, sex, pregnancy (including childbirth, lactation and related medical conditions), national origin, age, physical and mental disability, marital status, sexual orientation, gender identity, gender expression, genetic information (including characteristics and testing), military and veteran status, and any other characteristic protected by applicable law. Inclusion is a core value at HALO and we seek to recruit, develop and retain the most talented people.