

POSITION DESCRIPTION for BUSINESS ANALYST

IDENTIFYING INFORMATION

Job Title: Business Analyst

Regular Hours: M-F

Department: Administration

FSLA: Exempt

Reports To: VP of Administration

Effective Date: August 2022

POSITION SUMMARY

PRIMARY PURPOSE

The Business Analyst provides data and analysis to support optimal company performance by working cross-functionally to identify and implement changes that will improve company profitability and supporting processes.

YOUR NUMBERS

For each position, Swagelok Northern California utilizes a few critical metrics to drive success and provide clarity in decision-making. The critical few metrics for this position are:

- 1) 0 – Unaddressed negative gross margin line items continuing for over two months
- 2) 0 – Unaddressed part numbers with decreasing turns and increasing availability over three months
- 3) 0 – Stock “Yes” items not available to ship on time
- 4) 20 – Publication of profitability reporting by the 20th day of the following month

DUTIES AND RESPONSIBILITIES

Business Analyst Responsibilities:

- Identify and report on key business performance metrics and trends, including In-depth revenue, margin and profitability analysis.
- Working with the CFO, develop financial and operational performance targets.
- Identify and utilize leading indicators to create positive impacts on the company and its customers.
- Manage and support ongoing reporting and analysis needs of the company.
- Manage the company’s profitability assessment software for purposes of enhancing profitability and improving profitability measurement. Work with company and customer personnel to drive profit improvements.
- Assist CFO in the development, implementation and management of the company’s pricing policies and procedures.
- Prepare financial forecasts.
- Identify and implement opportunities to improve our processes and data quality.
- Work with Operations to improve operational performance, including ensuring inventory fulfillment strategy systems and stocking strategies are aligned with company and customer demands.
- Ensure production order costing standards are current and relevant.

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EDUCATION AND EXPERIENCE

EDUCATION & CERTIFICATIONS

Bachelor's degree in Finance, Accounting, Business Analytics or Economics

WORK EXPERIENCE

- *Required:*
 - 5+ years of accounting or finance experience for a for profit company generating \$50+ million annually.
 - 2+ years of analyzing business financial and operational performance
 - 2+ years developing or working with financial models
 - Experience with cost accounting or transactional costing.

SKILLS & COMPETENCIES

- **Computer Proficiency.** Thorough understanding of MS Office, including Excel and Access. SAP Business One and Crystal Reports (preferred), SAP Analytic Cloud or Power BI (preferred). Ability to write SQL queries.
- **Data Analysis and Interpretation.** Excellent awareness of numerical relationships and the ability to find opportunity in financial and operational data.
- **Business and Financial Acumen.** Thorough understanding of business operations and financial reporting and how decisions impact each.
- **Effective Communication.** Ability to communicate effectively and professionally with associates from diverse backgrounds, with diverse priorities across all levels of management and functional areas.
- **Multitasking.** Ability to manage multiple projects and responsibilities concurrently.
- **Inquisitiveness.** Strong desire learn, curious, and motivated by possibilities.
- **Accounting Processes.** Thorough understanding of accounting and costing processes.

ESSENTIAL VALUES FOR SUCCESS AT SWAGELOK NORTHERN CALIFORNIA

- **Respect.** Be supportive of an environment where people are trusted, respected and treated fairly. Be a role model for trust, respect and fairness.
- **Innovation.** Challenge conventional wisdom to create new value for the customer and company. Improve the company's methods of evaluating financial and operational performance. Enhance associate awareness of financial and pricing policies and the financial impact of their actions.
- **Customer Focus.** Create value for the customer in order to create value for Swagelok and the company. Share the positive and negative financial impacts of company financial performance to our customers and to our company when significant.
- **Integrity.** Choose to do the right thing with courage and character. Acting impartially and without bias in order to seek the most wise and just outcome. Prioritizing company and customer needs ahead of departmental and individual needs.
- **Quality.** Provide high value and high performance in our products, processes and services. Perform your work to the standard or better. The company understands that mistakes happen. When one occurs reflect on what happened and learn from the experience. This will reduce the frequency of future occurrences and ultimately preventing it from happening again.

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- **Continuous Improvement.** Consistently do things better to enhance safety, savings and productivity. Always be able to discuss with anyone something you have learned recently that is beneficial to you at work or even outside of work. Also be ready to discuss something that you are currently working on to help you improve in some way.

PHYSICAL DEMANDS AND WORK ENVIRONMENT

- Continually required to sit or stand
- Occasionally required to move around an office, production or warehouse environment
- Continually required to communicate with various stakeholders
- Continually required to read and view a computer screen
- While performing the duties of this job, the noise level in the work environment is typical of an office, production or warehouse setting.