

# ERP Financial Technical Lead

## Position Description

<b>Directorate:</b>	Finance and Corporate Services
<b>Reports to:</b>	Technology Solutions Architect
<b>Direct reports:</b>	NIL
<b>Location:</b>	Flexible within any of the Society's main metropolitan or regional offices across NSW.
<b>Primary position objective:</b>	The development and oversight of core organisational financial processes on Dynamics 365 Business Central, ensuring availability, architecture, security, integrations, add-ons, operation and development meet business needs through liaising with finance teams, managing associated costs and budget, levels of technical debt, disaster recovery and the strategic roadmap.

*The St Vincent de Paul Society is an Equal Employment Opportunity Employer*

### Directorate overview

This position is in the Finance and Corporate Services directorate. The teams within the directorate and their functions are:

**Information and Communications Technology:** this team is responsible for state-wide ICT strategy, ICT project management, design and implementation of new ICT systems (e.g. CRM, Business Intelligence), ICT service desk, and cybersecurity. The ERP Financial Technical Lead role is located within the Information and Communications Technology team.

**Finance and Accounting:** this team is responsible for state-wide finance policies and procedures; finance shared services (accounts payable, accounts receivable); treasury and investment functions; financial reporting to external stakeholders; financial strategy and special projects. The ERP Financial Technical Lead role liaises closely with the Finance and Accounting team to ensure a deep understanding of the team's needs and desires for the ERP system.

**Group Financial Planning and Analysis:** this team is responsible financial budgeting, forecasting and reporting; targeted financial analysis for senior management; strategic and operational advice to senior leadership to improve financial decision-making and business performance; and financial business partnership. The Finance Manager roles embedded in Vinnies Services and Commercial Enterprise, Fundraising and Communications directorates sit with this team. The ERP Financial Technical Lead role liaises with the Group Financial Planning and Analysis team to ensure that the team's needs and desires for the ERP system are met.

**Corporate Services:** this team is responsible for state-wide property management; facilities management; procurement; and fleet.

## Accountabilities and responsibilities

The ERP Financial Technical Lead will:

- Contribute to the successful implementation of the organisation's Strategic Plan within their team.
- Contribute to a safe working environment for staff, members and volunteers by exemplifying the Society's workplace health and safety practices.
- Support the implementation of effective risk management procedures to ensure compliance with legal, employment and governance requirements.
- Work closely and build excellent relationships with the Finance and Accounting, and Group Financial Planning and Analysis teams to gain a deep understanding of their business processes, what they need from the ERP system in order to perform their tasks effectively, and identify opportunities for improvement.
- Effectively translate business needs into technical requirements, ensuring that delivered functionality meets those requirements within the security and architecture framework.
- Function as organisation's key liaison to the vendor implementing Dynamics 365 Business Central to ensure that the vendor's implementation meets the organisation's needs, is high quality and easily maintainable.
- Work with the vendor to define and design the approach for introducing Dynamics 365 Business Central into the business so that it supports all the organisation's financial operations requirements.
- Make decisions to assess and select the most efficient, secure and effective technical solutions to meet business requirements within budget and time constraints.
- Define and design secure, robust and maintainable integrations between Dynamics 365 Business Central and the systems with which it needs to connect, such as the point-of-sale system, card payment system, CRM, payroll and accounts payable automation.
- Define and design the approach for migrating from Great Plains to Dynamics 365 Business Central, ensuring all current Great Plains processes are thoroughly understood and appropriately redesigned for implementation within Dynamics 365 Business Central.
- Ensure that the new Dynamics 365 Business Central service meets the availability, security and operational requirements of the organization, managing associated costs and budget, levels of technical debt and disaster recovery.
- Manage the roadmap for the organisation's Dynamics 365 Business Central implementation to ensure that it remains current, maintainable and fit-for-purpose.
- Identify gaps, strategic impacts, financial impacts and the risk profile in the technical solution.
- Report and manage technical debt levels.
- Manage all Business Central related contract commitments made with vendors including tracking, troubleshooting and reporting.
- Determine and implement best practice for all owned processes to achieve SLAs.
- Ensure excellent customer service to the Finance and Accounting, and Group Financial Planning and Analysis teams during business-as-usual, change requests and incidents.
- Provide and present ad hoc analyses such as contract terms, dollar spend, process compliance as requested by the organisation.
- Provide cost and technical inputs into major project business cases.
- Ensure DR is in place and tested regularly.

## Critical Key Performance Indicators (KPIs)

- Ensure that the organisation's Dynamics 365 Business Central implementation:
  - provides 100% of use cases currently provided by Great Plains and related add-ons.
  - provides continuous, uninterrupted and robust support for the organisation's financial processes
  - complies with the organisation's security requirements
  - anticipates and meet the organisation's emerging financial management needs
- Ensure that business change requests are well designed, and implemented correctly and effectively by the vendor
- Ensure that any issues identified by the business are addressed and resolved quickly and effectively

## Key working relationships

In addition to the manager and the Technology Services Team, the ERP Financial Technical Lead will foster close working relationships with:

- Finance and Corporate Services team members to develop a deep understanding of their day-to-day operations and champion their needs within Technology Services
- Group Financial Planning and Analysis team members to develop a deep understanding of their day-to-day operations and champion their needs within Technology Services

## Essential criteria

### Critical capabilities

There are nine capabilities expected of all employees across the Society:

- **'People we serve' centric:** (Level 1) Deliver, or support the delivery of, high-quality services that provide a hand up for the people we serve.
- **Values based leadership:** (Level 1) Develop an understanding and respect for and be aligned to the Society's mission, vision, values and lay Catholic heritage.
- **Impact focus:** (Level 1) Contribute to the delivery of positive impact through informed decision making and efficient and effective use of resources.
- **Collaboration:** (Level 1) Work collaboratively with others to solve challenges, foster the Society's mission and implement the Strategic Plan.
- **Change leadership:** (Level 1) Support the implementation of change.
- **Team performance:** (Level 1) Develop own performance and contribute to team performance.
- **Digital engagement:** (Level 2) Enable and facilitate participation in virtual, dispersed teams using digital tools.
- **Innovation and improvement:** (Level 1) Contribute to generating new ideas that will improve services and ways of working.
- **Financial acumen:** (Level 1) Use the Society's resources responsibly.

## Role-specific criteria

- Relevant tertiary qualification/s or experience in Accounting and Finance, with very strong financial literacy
- Relevant tertiary qualification/s in Information Technology or equivalent, with strong technical experience
- Experience administering and configuring Microsoft Dynamics 365 Business Central
- Experience designing robust integrations using APIs
- Substantial vendor management experience
- Excellent relationship management skills
- Excellent analytical skills
- Technical, system and integration design experience
- Excellent documentation skills for both a technical and business audience
- Substantial experience application development using C#, AL, JavaScript and MS SQL Server.
- Experience with SSRS and SSIS.
- Communicate well and multi-task under tight deadlines.
- Be a team player and a problem-solver.
- Customer-oriented approach.
- Excellent verbal and written communication abilities.

## Desirable criteria

- Experience developing Dynamics 365 Business Central extensions
- Experience administering and using Great Plains
- Great Plains Technical leadership and development experience specifically with GP Financial modules and add-ons such as Management Reporter.
- Working in Scrum Agile environments.
- Experience working in a mature DevSecOps environment.
- MB-800 certification or equivalent