



# Position Description

## Commercial and Business Investment Analyst

### Company Overview:

Heritage Lifecare is a provider of Residential Aged Care Facilities throughout New Zealand. We aim to add value and enhance performance for all those in our facilities. Our employees are united in our common purpose, mission and values and strive to ensure the delivery of respectful and caring services, in an environment that is safe for clients. Heritage aims to enable *the continued pursuit of excellence in care through monitoring, auditing, actioning and evaluation of service whilst respecting and valuing our residents, families and staff.*

Our pursuit of excellence comes from the things we value the most:

- **Integrity** – we are trustworthy, honest and ethical
- **Respect and Value** – we strive to show deep respect and consideration to all
- **Commitment** – we are dedicated to providing superior care
- **Effective** – we are driven to produce exceptional results
- **Efficient** – we strive for excellence through efficient work habits

### Position Overview

The purpose of this role is to establish and embed Heritage Lifecare's group-wide business case and investment approval framework. The role will support leaders across Operations, Property, Technology, People & Culture, and other support functions to develop robust business cases for spend, projects, and investments, ensuring proposals are strategically aligned, financially sound, operationally practical, and measurable.

With your influencing skills, you will constantly be challenging what we are doing and how we can continue to improve. We require on demand modelling and looking at opportunities to innovate and change the way we deliver services.

A large part of this role will involve coaching and supporting managers to prepare high-quality business cases, including options analysis, cost-benefit analysis, scenario modelling, implementation planning, risks, and measurable benefits. The role will also work closely with Commercial Finance to support project setup, benefit tracking, governance, and post-implementation review.

The role will also contribute to process improvement, workflow design, policy and procedure development, and decision-support tools where these strengthen investment discipline and delivery outcomes.

As you will be working with data, it is important you have strong Excel capability and an ability to pick up systems quickly.

**Reports to:** Head of Mergers, Acquisitions and Business Development

## Functional Relationships

- Commercial Finance team and Finance Business Partners
- Executive Team and Senior Leadership Team
- Operations, Property, Technology, People & Culture, and other support functions
- Project sponsors, initiative owners, and governance forums

## Team Structure



## Key Accountabilities

### Business Case Framework and Governance

- Develop, implement, and maintain Heritage's business case policy, procedures, templates, guidance notes, and minimum standards.
- Define fit-for-purpose approval pathways, financial thresholds, documentation requirements, and stage gates for spend and investment proposals.
- Ensure consistency in assumptions, options analysis, benefit measurement, risk assessment, and investment appraisal methods.
- Train and coach managers to prepare clear, well-evidenced business cases and supporting papers.

### Business Case Development and Decision Support

- Partner with leaders across the business to develop business cases for operational, workforce, technology, property, quality, and service improvement initiatives.
- Undertake financial modelling, cost-benefit analysis, sensitivity analysis, and scenario modelling to support decision making.
- Challenge assumptions constructively and ensure proposals clearly articulate strategic rationale, delivery requirements, and expected return on investment.
- Prepare executive-quality papers, presentations, and recommendations for approval forums.

### **Project Setup, Monitoring, and Benefits Realisation**

- Work with Commercial Finance to establish approved initiatives in financial systems, including project codes, budgets, baselines, and reporting requirements.
- Define and monitor agreed KPIs, milestones, spend, benefits, risks, and implementation assumptions against approved business cases.
- Support post-implementation reviews to assess whether expected benefits have been delivered and to capture lessons learned.
- Provide regular reporting and commentary on approved investments and change initiatives.

### **Process Improvement and Controls**

- Identify opportunities to improve the efficiency, consistency, and timeliness of the business case and approval process.
- Develop workflow maps, templates, and control points that strengthen governance and decision quality.
- Recommend process changes that improve visibility of investment outcomes, accountability, and value for money.

### **Stakeholder Management and Capability Building**

- Build trusted relationships across operational and support functions to improve commercial thinking and investment discipline.
- Facilitate workshops and working sessions to shape proposals, clarify assumptions, and align stakeholders.
- Promote a culture of evidence-based decision making, accountability, and continuous improvement.

### **Measures of Success**

- Adoption of a consistent business case framework across the organisation
- Improvement in the quality and timeliness of business cases submitted for approval
- Clear linkage between approved initiatives and measurable financial / operational outcomes
- Effective setup and tracking of approved initiatives with Commercial Finance
- Completion of post-implementation reviews and benefits realisation reporting

## Person Specification

### Essential skills, knowledge and experience

- Bachelor's degree in finance, commerce, accounting, economics, business, engineering, or a related discipline; or equivalent practical experience.
- Demonstrated experience preparing high-quality business cases, investment proposals, or commercial decision-support papers.
- Strong financial modelling capability, including cost-benefit analysis, sensitivity analysis, and scenario modelling.
- Ability to translate complex operational or technical issues into clear commercial recommendations for non-financial stakeholders.
- Experience building templates, frameworks, policies, or governance processes that improve decision quality and consistency.
- Strong Excel skills and confidence working across multiple systems.
- Excellent stakeholder engagement and influencing skills, including the ability to challenge constructively.
- Highly organised, detail-oriented, and comfortable working across multiple initiatives at pace.
- Ability to use AI tools appropriately to improve productivity, quality, and decision making.

### Desirable skills, knowledge and experience

- Experience in health, aged care, social infrastructure, or other service-based sectors.
- Experience working with project governance, benefits realisation, or PMO disciplines.
- Experience with business intelligence / reporting tools.
- Formal training or certification in business case development, project management, or continuous improvement.

## Core Competencies

<b>Trusted Partner</b>	Values and builds long term relationships, puts the clients' interests in front of their own, is genuinely interested in their client and their business challenges, works hard to understand the client's strategy and approach not just surface wants. Is reliable – does what they say they will do. Develops and maintains credibility, is genuinely passionate and enthusiastic whilst maintaining authenticity.
<b>Driving for Results</b>	Sets goals for personal and team accomplishment; uses measurement methods to monitor progress toward goals; tenaciously working to meet or exceed goals while deriving satisfaction from that achievement and continuous improvement.
<b>Tenacity</b>	Distinguishes between challenging circumstances and those involving exploitation or inappropriate conduct. Addresses difficulties and draws skills, knowledge and understanding to find solutions to problems. Ensures that setbacks and challenges inform the review and evaluation processes. Recognises all people's learning and contribution to feedback. Maintains an energetic and focused approach to new or repeated challenges.
<b>Business Acumen</b>	Displays a keenness and quickness in understanding and dealing with a "business situation" in a manner that is likely to lead to a good outcome. Uses their approach to improving financial performance and leadership development.
<b>Deal with Ambiguity</b>	Anticipates impact of change; plans how to shift gears Uses ingenuity to compensate without having the total picture. Rises to the challenge, accepting risk and uncertainty as normal. Accepts change in job requirement, schedules, or work environments as part of job. Adaptable with the unknown
<b>Thought Leadership</b>	Using your knowledge of your business environment, use past experiences, relevant literature, best practice, market-leading approaches and unconventional results which have driven success, come up with winning ideas, and create innovative solutions to solve existing and new business challenges.
<b>Courage</b>	Display professional courage by seeking feedback and listening, say what really needs to be said in a professional manner, communicate openly and frequently, embrace change, make decisions and move forward, give credit to others and hold yourself and where appropriate others accountable.
<b>Facilitating Change</b>	Encouraging others to seek opportunities for different and innovative approaches to addressing problems and opportunities; facilitating the implementation and acceptance of change within the workplace.

*The intent of this position description is to provide a representative summary of the major duties and responsibilities and the competencies expected to be performed by employees in this job classification. Employees may be requested to perform job related tasks other than those specified in this Position Description.*