

POSITION DESCRIPTION

Business Planning and Insights Manager

Reports to:	Associate Dean Academic and Operations
Division:	Waikato Management School
Tenure:	Continuing
Location:	Hamilton
Date:	30 June 2025

Vision

Ko te tangata

A research-intensive university providing a globally connected, innovative and inclusive studenty experience in an environment characterised by a commitment to diversity, respect for Indigenous knowledge, and high levels of community engagement.

Values

Ko te mana o Te Whare Wānanga o Waikato ka herea ki tō tātou:

- Tū ngātahi me te Māori
- Mahi pono
- Whakanui i ngā huarahi hou
- Whakarewa i te hiringa i te mahara

The University of Waikato places a high value on:

- Partnership with Māori
- Acting with integrity
- Celebrating diversity
- Promoting creativity

1. GENERAL

The Division of Management (known externally as the Waikato Management School, WMS) offers qualifications at the undergraduate, postgraduate and doctoral levels and is one of five Divisions at the University of Waikato. The Division has distinguished itself among New Zealand business schools by the relevance and the rigor of its education and its research. It is a member of an elite group of global business schools that have earned Triple Crown status – an international acknowledgement of excellence in business education.

2. POSITION PURPOSE

The Business Planning and Insights Manager will play a critical role in supporting data-informed strategic and operational decision-making across Waikato Management School. This position will
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be responsible for the collection, analysis, and provision of key information and insights related to financial management, planning, curriculum development, teaching quality, learner success, graduate outcomes, resource utilisation, and divisional operations. The role will contribute to continuous improvement and strategic planning through the provision of actionable business insights.

The Business Planning and Insights Manager will develop first class AI skills and will mentor and support colleagues to do the same. In consultation with the ADAO, they will collaborate with the Director of Digital Innovation and Strategy and process owners to prioritise and drive initiatives for productivity and process automation, using AI.

3. FUNCTIONAL RELATIONSHIPS

Internal:

- Pro Vice-Chancellor
- Associate Dean Academic and Operations
- ETeam members
- Divisional Managers – Programmes and Accreditation and Students
- Schools Operations Manager
- Director of Digital Innovation and Strategy
- Senior Manager Marketing WMS
- Schools leadership team
- Alumni and Engagement Advisor
- WMS academic and professional staff
- Central teams including, Planning, Performance and Analytics, ITS, Student Administration and Systems, Te Puna Ako, Financial Services, Library, People and Capability, Academic Office, Development and Alumni Office
- Staff from other Divisions

External:

- External data providers (e.g., education agencies, benchmarking bodies, economic development agencies, industry peak bodies)
- Accreditation bodies (e.g., AACSB, EQUIS, AMBA, CAANZ)
- Tertiary sector working groups or networks

4. KEY RESPONSIBILITIES

Business Planning and Financial Analysis

- Collaborate with the PVC, ETeam and the Finance Business Partner to develop, monitor, and review the Division's annual planning, budget development and review processes, ensuring alignment with strategic and operational objectives.
- Identify and analyse income streams and associated costs related to the delivery of teaching, research and services in conjunction with the Finance Business Partner and WMS budget holders.
- Support the assessment of the financial viability and sustainability of current and proposed programmes, using income and expenditure information to support divisional decision-making.
- Monitor financial performance against budget, identify variances, and provide insights and recommendations to the PVC and ETeam to address risks or opportunities.
- Contribute to business cases and operational improvement initiatives.

- Support evidence-based planning and resource allocation by preparing financial summaries, forecasts, and scenario analyses.
- Contribute to the continuous improvement of financial planning and reporting processes within the Division and University.

Systems Development and Integration

- Work with internal stakeholders to ensure efficient use of reporting and planning information.
- Identify opportunities to automate and streamline information collection and reporting processes.
- Support the integration of various systems to enable holistic data usage across teaching, research, and operations.

Process Improvement

- Work with process owners to utilise AI tools to automate and streamline administrative tasks, such as scheduling, data entry, accreditation, and document management, to enhance efficiency and accuracy.
- Ensure effective and efficient data management systems are integrated which leverage AI-powered document management systems to improve organisation and information retrieval.

Internal Stakeholder Engagement and Training

- Act as a key liaison between WMS and central planning and analytics teams, including Financial Services, Planning, Performance and Analytics, People and Capability, Student Systems and Administration, ITS, and Development and Alumni Office.
- Provide guidance to WMS staff on information analysis and interpretation of reports.

Information Analysis and Reporting

- Analyse and report on a variety of external, institutional and divisional data.
- Develop dashboards to support performance monitoring
- Identify trends and provide insights to inform strategic and operational decisions
- Work with the Divisional Manager Programmes and Accreditation to prepare data to support accreditation submissions and reporting requirements.
- Promote a culture of evidence-based decision making.

Team Contribution

- Work effectively as a member of the Division to support other team members and provide support and/or coverage of functions.
- Work collaboratively to encourage transparency across activities, open sharing of knowledge, and the building of positive relationships to support a high-performance culture.
- Work with other team members on projects.
- Support a positive culture and morale.
- Comply with and undertake responsibilities set out in the University's Health and Safety Policy.

Continuous Improvement

- Actively contribute to the ongoing development and improvement of WMS systems and processes.
- Recommend improvements based on data, AI, and technology trends and user feedback.
- Support change initiatives aligned with divisional and university priorities.

NOTE: Staff have an annual Objectives, Development and Reflection (ODR) meeting with their manager.

5. PERFORMANCE STANDARDS

The Business Planning and Insights Manager will be performing satisfactorily when:

- Information and analysis that is provided is timely, accurate, and relevant to stakeholder needs.
- Budget and financial information is available to support the planning and decision-making processes in the Division.
- Stakeholders report confidence in the quality and value of information services.
- Information and dashboards are maintained and enhanced to reflect evolving priorities.
- Effective collaboration is maintained with internal and external partners.
- Contributions to projects and planning processes demonstrate initiative and value.
- Valuable contributions and participation in relevant meetings and/or projects are provided. Advice provided complies with professional standards, University policies and procedures and supports the University's strategic objectives.
- Safe and healthy work practices are followed that comply with University policies and procedures, relevant work standards and statutory obligations.

PERSON SPECIFICATION

EDUCATIONAL QUALIFICATIONS

Essential

- A relevant bachelor's degree in business, project management, information systems, data science, statistics, or a related field, or significant relevant experience.

Desirable

- Postgraduate qualifications in analytics, management, project management, or related areas.

SKILLS, KNOWLEDGE and EXPERIENCE

Essential

- Demonstrated experience in an information analysis, business planning, or similar role.
- Strong skills in information analysis, visualisation, and reporting (eg, Power BI, Excel).
- Proven ability to interpret complex data and present findings to diverse audiences.
- Excellent written and verbal communication skills.
- Ability to work independently and as part of a team.
- Strong problem-solving and critical-thinking skills.
- Advanced Microsoft Office skills, including Word, Excel, Outlook and PowerPoint.
- Able to successfully engage with a diverse range of stakeholders and at all levels of the organisation.
- Commitment to equal opportunity and to the University's partnership with Māori as intended by te Tiriti o Waitangi.
- Demonstrated awareness of Māori and Pacific cultures.

Preferred

- Experience in the tertiary education sector.
- Familiarity with student management and academic reporting systems.
- Understanding of change management methodologies.
- AI usage skills to an advanced level.

PERSONAL QUALITIES

- Consultative and inclusive working style.
- Adaptable and resilient in a dynamic environment.
- A collaborative team player who builds positive relationships.
- Strong attention to detail and high standards of accuracy.
- Self-motivated with the ability to manage competing priorities and maintain progress.
- Demonstrated commitment to continuous improvement and innovation.
- Culturally competent and supportive of diversity in the workplace.