



FP&A Manager

Calderbrook Facilities Group Ltd (fictional)

A practical hiring report based on your vacancy.

ORDER REFERENCE	REPORT VERSION	REPORT DATE	LOCATION
SAMPLE-0001	1	7 October 2026	Wakefield

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FICTIONAL SAMPLE

Invented company, vacancy and brief, created to show the report format. Not a real employer and not market evidence.

1. Decision summary

PAUSE Pause: pause until the open points are resolved

Material unresolved decisions prevent a reliable recommendation. The pack below is provisional.

The operational problem is clear; the case for this particular hire is not yet established.

To proceed, Calderbrook must confirm budget approval for this FP&A Manager vacancy, confirm whether alternatives were considered, and resolve contradictions in the role's scope and responsibilities.

Why

- Budget approval is not confirmed.
- The brief does not say whether alternatives were considered.
- Contradictions between the brief and job description on team management, work pattern, and ERP/BI project leadership.

Decisions needed to proceed

BLOCKER	Confirm whether the budget for this hire is approved, and by whom. The salary range alone is not approval. (Employer)
BLOCKER	Decide whether a systems or process fix, reshaping existing roles or interim support would address the problem before committing to this hire. (Employer)
BLOCKER	Resolve the work pattern: the brief says "Hybrid, on site at month-end", the job description says "Location: Wakefield head office (office-based, Monday to Friday)". (Employer)
BLOCKER	Resolve the direct reports: the brief says "None", the job description says "Manage and develop a team of analysts". (Employer)
BLOCKER	Decide who owns the ERP or BI project: this role leading it, supporting it, or someone else. (Employer)
BEFORE PUBLISHING	Confirm if weekly depot travel is essential and why. (Employer)
BEFORE PUBLISHING	Confirm if Power BI is required for board reporting. (Employer)
BEFORE PUBLISHING	Confirm if a Big Four background is genuinely required. (Employer)
BEFORE PUBLISHING	Provide bonus scheme terms and pension contribution details. (Employer)

Built from the facts you supplied. No statistics or estimates are added; salary figures are Finance Hiring Lab reference figures. This check reduces the risk of a mis-hire; it cannot remove it.

Every report is checked before release by a finance recruitment specialist with ten years' experience as owner-director of a boutique finance recruitment consultancy.

2. Diagnosis of the operational problem

Not enough capacity

Unknown: test it

Possible explanation: the Finance Director is spending excessive time manually compiling contract profitability, indicating a lack of capacity for timely and accurate reporting and forecasting.

Evidence from the brief

- FD spends three days a month stitching profitability together in Excel.
- The business run cleaning and maintenance contracts from nine regional depots on about £30m turnover, and nobody can tell the business which contracts make money until weeks...
- Two contract renewals were priced last year without up-to-date margin data.

How to test it. Would freeing the FD's time give timely, reliable profitability reporting, or is the cause systems or process?

What a hire alone changes. A hire would free up senior management time and allow for more timely reporting, but only if the systems and data flows are reliable.

Unreliable inputs

Supported

Inputs to profitability reporting are unreliable due to manual re-keying and disconnected systems.

Evidence from the brief

- Job-costing system and Sage 200 do not talk to each other.
- Every month someone re-keys depot labour hours.

How to test it. Can the new hire establish reliable data flows and reconciliations between systems?

What a hire alone changes. A hire can improve processes and checks, but will still depend on the quality and timeliness of data from operational systems.

Systems that do not connect

Supported

Lack of integration between Sage 200 and the job-costing system is a root cause of manual work and unreliable numbers.

Evidence from the brief

- Systems do not talk to each other.
- Manual re-keying of data.

How to test it. Is there a plan or authority for the new hire to lead or support systems integration?

What a hire alone changes. A hire can support process improvements but cannot alone deliver systems integration without project ownership and resources.

Unclear ownership or process

Supported

Ownership of contract profitability reporting and forecasting is unclear, with a senior manager currently covering and the FD rebuilding reports.

Evidence from the brief

- A senior manager is covering.
- FD rebuilds profitability pack by hand.

How to test it. Will the new hire have clear ownership of profitability reporting and forecasting deliverables?

What a hire alone changes. A hire can take ownership if the role is clearly defined and supported, but will depend on clarity of responsibilities and authority.

Where the hire still depends on others. The hire will still depend on reliable data inputs from Sage 200 and the job-costing system, and on decisions about systems integration and project ownership that are outside the role's direct control.

Conditions for the hire to succeed

Condition	Owner	Status
Budget for the hire is approved.	Employer	To confirm
Ownership of contract profitability reporting and forecasting is clearly assigned to the new hire.	Finance Director	To confirm
Decision on who leads ERP/BI platform selection and implementation.	Finance Director	To confirm
Reliable data flows between Sage 200 and the job-costing system.	Finance/IT	To confirm

3. Evidence, contradictions and unknowns

Fact	State	Detail, or the question to ask
Budget approval	Not known yet	Not known yet; must be confirmed before proceeding.
Alternatives considered	Not known yet	Not known yet; must be considered before proceeding.
Work pattern	Contradictory	Brief: "Hybrid, on site at month-end". Job description: "Location: Wakefield head office (office-based, Monday to Friday)". Resolve before advertising.
Direct reports	Contradictory	Brief: "None". Job description: "Manage and develop a team of analysts". Resolve before advertising.
ERP/BI project leadership	Contradictory	Job description assigns ERP/BI platform selection and implementation to this role; brief does not mention this as a requirement.
Qualification and experience	Confirmed	Built driver-based budgets and rolling forecasts for a multi-site business; contract or site-level profitability reporting; strong Excel modelling.
Travel and driving licence	Not supplied	Not stated in the brief; confirm if weekly depot travel is essential for the work.
Power BI requirement	Not supplied	Not stated in the brief; confirm if Power BI is required for board reporting.
Bonus and pension details	Not supplied	Bonus scheme and pension contribution details not supplied.

Only confirmed facts support a firm conclusion. Missing facts are asked; contradictions are named.

4. Business case and alternatives

The problem. The business cannot reliably or promptly report contract profitability by depot, resulting in late, unreliable management accounts and weak forecasting.

What it costs today (partly supplied)

- Late or unreliable numbers
- Management time (FD spends three days a month on manual reporting)
- Decisions made without numbers
- Two contract renewals priced without up-to-date margin data

The business is exposed to delayed and potentially incorrect commercial decisions due to unreliable profitability data and weak forecasting.

What a wrong hire would put at risk

- Salary and recruitment fees if the wrong hire is made
- Notice and re-hire time
- The problem remaining unsolved
- Management time lost to manual reporting

Is a hire the right fix?

Option	Assessment
A new hire	Would address capacity and ownership if the role is well defined and budget is approved, but scope and project responsibilities must be clarified.
Reshape existing roles	Could be considered if existing staff can take on the work with process or system support.
Interim or temporary cover	Could bridge the gap while a permanent solution is defined, especially if deadlines are tight.
Systems or process change	Systems integration or process changes may be needed in parallel or as an alternative.
Pause	Pause until budget approval and the consideration of alternatives is confirmed.

Budget approval is not confirmed and consideration of alternatives is not confirmed.

Timeline and bridge

No deadline was supplied

No dates or deadlines were supplied. Without supplied deadlines or business event dates, it is not possible to assess whether a gap will occur or whether interim cover is needed.

The need for interim support cannot yet be assessed. No deadline was supplied, which does not show that no interim support is needed.

- Are contract renewals or other decisions with deadlines coming up, and when?
- What is the target start date for the new hire?

Outcomes at 6 and 12 months

At 6 months: Monthly contract profitability pack by depot that the Finance Director does not have to rebuild by hand From your brief

Accepted when. Pack is reconciled to the ledger, allocation rules agreed with depot managers, and signed off by the Finance Director

Owner. The new hire, with sign-off by the Finance Director

Depends on. Reliable data from Sage 200 and job-costing system (provided by Finance/IT)

Timing. Within six months of start

At 6 months: First rolling forecast agreed with depot managers From your brief

Accepted when. Forecast is reviewed and accepted by depot managers and the Finance Director

Owner. The new hire

Depends on. Input from depot managers (provided by Operations)

Timing. Within six months of start

At 12 months: Annual budget built bottom-up by depot and contract, with quarterly reforecasts From your brief

Accepted when. Budget and reforecasts are signed off by the Finance Director and depot managers

Owner. The new hire

Depends on. Input from depot managers (provided by Operations)

Timing. Within twelve months of start

5. Role level, salary, package and work pattern

Level and title

Title: FP&A Manager (kept).

The brief describes a hands-on FP&A Manager focused on contract profitability and forecasting, reporting to the Finance Director with no direct reports.

Title, reporting line, and duties in the brief align with an FP&A Manager role focused on reporting and forecasting.

Team management and ERP/BI project leadership in the job description are not supported by the brief and would require a higher level and different budget.

Clarify scope before proceeding.

Title subject to clarification of team management and project leadership scope.

Salary and package

Salary range supplied; budget approval unconfirmed.

- Salary range: £55,000 – £65,000
- Pension
- 25 days' holiday plus bank holidays
- Annual bonus scheme

Budget approval is not confirmed; a salary range is not approved expenditure.

Bonus scheme terms and pension contribution details are missing and must be supplied before advertising.

How to test the package

- Test the salary and package by advertising the revised role and monitoring candidate response.

Compares the supplied budget with the supplied duties and level.

Work pattern

- Hybrid, on site at month-end (brief)
- Office-based, Monday to Friday (job description)

There is a contradiction between the brief (hybrid, on site at month-end) and the job description (office-based, Monday to Friday).

No start date or required notice period was supplied.

- Clarify the intended work pattern before advertising.
- Confirm whether hybrid working is permitted and if so, under what conditions.

6. Revised job description

Provisional hiring pack—requires employer confirmation before use.

Purpose. Deliver reliable, timely contract profitability reporting and rolling forecasts for a multi-site facilities services group, freeing up senior management time and enabling better commercial decisions.

Reporting. Reports to the Finance Director or CFO. No direct reports (to confirm).

Outcomes in the first six months

- Monthly contract profitability pack by depot that the Finance Director does not have to rebuild by hand.
- First rolling forecast agreed with depot managers.

Outcomes in the first twelve months

- Annual budget built bottom-up by depot and contract, with quarterly reforecasts.

Main responsibilities

- Own the annual budget and monthly rolling forecasts for the group.
- Build driver-based budgets and rolling forecasts for a multi-site business.
- Produce contract or site-level profitability reporting.
- Model in Excel for reporting and forecasting.
- Partner with depot managers to agree allocation rules and understand contract performance.

Essential

- Experience owning annual budgets and monthly rolling forecasts for a multi-site business.
- Experience building driver-based budgets and rolling forecasts for a multi-site business.
- Experience producing contract or site-level profitability reporting.
- Strong Excel modelling for reporting and forecasting.
- Ability to present profitability and forecasts clearly to the board and depot managers.
- Ability to reconcile and ensure reliability of data from multiple systems. (Suggested: confirm with employer)

Desirable

- Experience with Power BI for reporting (Provisional: confirm).
- Experience supporting ERP or system improvements.

Confirm at screening (not scored)

- CIMA, ACCA or equivalent, or qualified by experience (employer to confirm).
- Able to attend the Wakefield office at month-end (hybrid pattern, to confirm).
- Full UK driving licence and depot travel, if confirmed as essential.

7. Candidate advert

Provisional hiring pack—requires employer confirmation before use.

FP&A Manager: own budgets, forecasts and contract profitability across nine depots

Own annual budgets, rolling forecasts and contract profitability reporting for Calderbrook Facilities Group's nine depots, giving the business reliable numbers for commercial decisions.

What you'll do

- Own the annual budget and monthly rolling forecasts for the group
- Produce monthly contract profitability reporting by depot
- Model in Excel for reporting and forecasting
- Partner with depot managers to agree allocation rules and understand contract performance

What you'll bring

- Experience owning annual budgets and monthly rolling forecasts for a multi-site business
- Experience producing contract or site-level profitability reporting
- Strong Excel modelling skills
- Able to present profitability and forecasts clearly to the board and depot managers
- [To confirm before publishing: CIMA, ACCA or equivalent, or qualified by experience; Power BI (desirable)]

Location, pattern and package

- Location: Wakefield.
- Work pattern: [To confirm: work pattern: hybrid, on site at month-end (brief) or "Location: Wakefield head office (office..." (job description)].
- Salary: £55,000–£65,000 [To confirm: budget approval]. Benefits: [To confirm: pension]; 25 days' holiday plus bank holidays; annual bonus.

Internal: check before publishing (not part of the advert)

- Confirm budget approval, team size and ERP/BI ownership.
- Resolve the work pattern and confirm whether depot travel, Power BI and a Big Four background are needed.
- Supply bonus and pension terms.

8. Interview plan and exercise specification

Provisional hiring pack—requires employer confirmation before use.

Stage	Purpose and format	Duration and preparation	Decision by	Owner
Screening call	Check multi-site budgeting, contract profitability and Excel experience; confirm qualification and work pattern. Video or phone call	30 minutes. Preparation: None	Within one working day	Hiring manager
Technical exercise and interview	Exercise on fictional depot data, then discussion of the findings. In-person or video interview with exercise	75 minutes (45 exercise, 30 discussion). Preparation: None; exercise done on the day	Within two working days	Finance Director
Final interview	Board-level communication and partnering with depot managers. In-person or video interview	45 minutes. Preparation: None	Within two working days	Finance Director and/or CFO

Proposed: for employer confirmation. A suggested structure; confirm the stages, owners and timings before use.

Decision timing: Offer decision within one week of final interview

Exercise specification: Contract Profitability and Rolling Forecast Exercise

This is an exercise specification. The employer prepares the fictional data pack before use; no completed exercise pack is supplied with this report.

Fictional data for three depots from Sage 200 and a job-costing spreadsheet, with a few deliberate inconsistencies.

Time limit: Proposed: 45 minutes, for employer confirmation. **Software:** To confirm: say whether candidates work in Sage 200 on a test company file or in a spreadsheet

The employer supplies (invented data only)

- Depot revenue and cost extract (Sage 200)
- Job-costing sheet with labour hours by contract

The candidate

- Reconcile contract profitability by depot using the supplied data
- Identify and explain any inconsistencies or missing allocations
- Build a simple rolling forecast for the next quarter

What to score

- Reconciling the inconsistent data
- Accuracy of the depot profitability view
- Usefulness of the forecast and summary

9. Weighted scorecard

Provisional hiring pack—requires employer confirmation before use.

How to score. Multiply each 1–5 criterion score by its percentage weight, add the results and divide by 100 to obtain a weighted score out of five.

Essential minimum: any essential criterion scored below 3 flags the candidate for review, whatever the weighted total.

Suggested weights: employer to confirm before use. Weights total 100%.

Owning annual budgets and monthly rolling forecasts for a multi-site business

24%

Scores essential 1 of the revised job description.

Questions

- Describe your experience owning annual budgets and monthly rolling forecasts for a multi-site business.

Evidence to collect. Clear, relevant example from previous role **Minimum:** Has owned and delivered annual budgets and rolling forecasts for a multi-site business and shows it in the exercise.

- 1 No budget or forecast ownership; cannot build a forecast from the depot data.
- 3 Owned a single-site budget; exercise forecast works with gaps.
- 5 Led multi-site budgeting and reforecasting; exercise forecast accurate and decision-ready.

Building driver-based budgets and rolling forecasts for a multi-site business

18%

Scores essential 2 of the revised job description.

Questions

- Describe your experience building driver-based budgets and rolling forecasts for a multi-site business.

Evidence to collect. Clear, relevant example from previous role **Minimum:** Has built and owned a rolling forecast for a multi-site business and shows it in the exercise.

- 1 Cannot name a driver behind a forecast.
- 3 Uses some drivers (hours, contracts) with prompting.
- 5 Drivers tie to depot operations and flex for contract wins and losses.

Producing contract or site-level profitability reporting

18%

Scores essential 3 of the revised job description.

Questions

- Tell us about a time you produced contract or site-level profitability reporting.

Evidence to collect. Example of contract/site profitability reporting **Minimum:** Has produced contract or site-level profitability reporting and can reconcile data from multiple sources.

- 1 Never produced contract or site P&Ls.
- 3 Built site P&Ls but allocation rules unclear.
- 5 Built contract P&Ls used to price renewals; explains allocation trade-offs.

Strong Excel modelling for reporting and forecasting

15%

Scores essential 4 of the revised job description.

Questions

- What Excel techniques do you use for forecasting and profitability analysis?

Evidence to collect. Demonstrated Excel modelling in exercise **Minimum:** Can build a working Excel model for reporting and forecasting from supplied data.

- 1 Cannot build a working model from the supplied data.
- 3 Model works with some structure; limited checks.
- 5 Well-structured, checked model another person could run next month.

Ability to present profitability and forecasts clearly to the board and depot managers

10%

Scores essential 5 of the revised job description.

Questions

- How would you present contract profitability and forecasts to the board and depot managers?

Evidence to collect. Example of presenting to senior stakeholders **Minimum:** Can communicate findings clearly and appropriately for the audience.

- 1 Cannot explain the findings without jargon.
- 3 Understandable but unfocused.
- 5 Concise, actionable message for each audience, with the key margin issues first.

Data reliability and reconciliation between systems **Provisional: confirm**

15%

Scores essential 6 of the revised job description. Suggested: confirm with employer.

Questions

- Describe a time you had to reconcile data from multiple systems for reporting.

Evidence to collect. Example of data reconciliation between systems **Minimum:** Has reconciled data from multiple systems and can explain their approach to ensuring reliability.

- 1 Has not reconciled data between systems.
- 3 Resolves differences between Sage 200 and job-costing data with help.
- 5 Reconciles, explains variances and proposes a control to stop them recurring.

Confirm at screening (not scored): CIMA, ACCA or equivalent, or qualified by experience (employer to confirm); Able to attend the Wakefield office at month-end (hybrid pattern, to confirm); Full UK driving licence and depot travel, if confirmed as essential

- Score all 6 criteria on the 1–5 anchors and apply the weights: Owning annual budgets and monthly rolling forecasts for a multi-site business (24%); Building driver-based budgets and rolling forecasts for a multi-site business (18%); Producing contract or site-level profitability reporting (18%); Strong Excel modelling for reporting and forecasting (15%); Ability to present profitability and forecasts clearly to the board and depot managers (10%); Data reliability and reconciliation between systems (15%).
- Use the fictional exercise to test reasoning, accuracy, and usefulness of outputs.
- Do not score qualifications, desirables, or screening conditions.
- Do not ask for or review confidential models or files from previous employers.

10. Requirements audit

Remove only where there is positive evidence that an item is out of scope or inflated. Where the brief is silent, the item is confirmed before deciding.

Requirement	Status	Why (source)	Question
Lead the selection and implementation of a new ERP and BI platform Scope creep	Confirm: brief silent or unclear	The brief does not mention ERP/BI project leadership. (job description)	Who owns ERP/BI selection and implementation?
Manage the month-end close and statutory accounts Scope creep	Confirm: brief silent or unclear	The brief covers profitability and forecasting, not statutory accounts. (job description)	Own month-end and statutory accounts, or support them?
Manage and develop a team of analysts Scope creep	Confirm: brief silent or unclear	Contradiction: brief states no direct reports. (job description)	Will the hire manage analysts?
CIMA or ACCA qualified	Confirm: brief silent or unclear	Qualification kept as a screening condition. (job description)	Is CIMA/ACCA essential, or is qualified by experience acceptable?
At least 5 years' post-qualification experience Years served / PQE	Remove	Years served is a proxy for capability. (job description)	None
Power BI expert Vague trait	Confirm: brief silent or unclear	The brief requires strong Excel modelling. (job description)	Which board reporting is needed, and does Power BI or Excel deliver it?
Experience of leading an ERP implementation end to end Scope creep	Confirm: brief silent or unclear	The brief does not mention ERP implementation. (job description)	Is ERP implementation leadership needed?
Big Four background preferred Big Four or practice-only filter	Confirm: brief silent or unclear	The brief does not mention Big Four background. (job description)	Does depot profitability work need Big Four experience, or is multi-site FP&A enough?
Outstanding communicator with gravitas at board level Vague trait	Keep: reworded	Vague trait. Wording: Able to present contract profitability and forecasts clearly to the board and depot managers. (job description)	None
Full UK driving licence and willingness to travel to all depots weekly Licence or travel	Confirm: brief silent or unclear	The brief does not mention travel or a driving licence. (job description)	Is weekly depot travel needed for the work, and why?
Own the annual budget and monthly rolling forecasts for the group	Keep: essential	Core FP&A duty, supported by the brief. Wording: Own the annual budget and monthly rolling forecasts for the group. (job description)	None

Requirement	Status	Why (source)	Question
Build Power BI dashboards for the board	Confirm: brief silent or unclear	The brief does not specify Power BI dashboards. (job description)	Which board reporting is needed, and is building it this role's job?

11. Sources, assumptions, limitations and clarification terms

Type	Source	Detail
Employer-supplied fact	Brief: Problem to solve, cost, systems, outcomes, and requirements	All operational and business case facts, requirements, and outcomes are from the employer-supplied brief.
Finance Hiring Lab reference figures	Finance Hiring Lab reference figures	The pay context in the Salary section: full-time gross pay for this type of role across all levels in the region, with the UK middle range. Not a band for this specific role, and kept separate from the employer's own salary range.
Employer-supplied fact	Job description	All job description lines and requirements are from the employer-supplied draft.

Assumptions

- No dates or deadlines for hiring, handover, or business events were supplied.
- The role is intended to address unreliable management accounts, lack of contract profitability visibility, and weak forecasting.

Limitations

- Conclusions rest on the employer's brief and job description; the reference figures in the Salary section are general regional pay context, not a band for this role.
- No dates or deadlines were supplied, so timeline and interim needs cannot be fully assessed.

Open questions for the employer

- Is the budget for this hire approved, and by whom?
- Have you considered reshaping an existing role, interim cover, a system or process change, or waiting?
- Who will own the ERP and BI platform selection and implementation: the new hire, the Finance Director, or another role?
- Is the new hire expected to manage a team of analysts, or is this a carry-over from a previous job description?
- Is weekly travel to all depots genuinely required for the FP&A work, and what is the business reason?
- Is Power BI the required reporting tool, or is Excel sufficient for the board pack?
- Is a Big Four background genuinely required, or is experience in multi-site contract profitability and forecasting sufficient?
- What are the bonus scheme terms and pension contribution details?

Clarification terms (included service)

- Included: Within seven calendar days of delivery you may request either up to two written questions about the report, sent through your order page and answered in writing, or one 15-minute call about the report, by arrangement. A revised report and a second vacancy are not included. We answer written questions, or offer a call time, within two working days of the request.
- A materially changed role (for example a different title, seniority, responsibilities, reporting line or location, where it changes the assessment) is a new Health Check, not a clarification. Following a role change recommended in the report does not by itself require another purchase.