



## **Position Description**

### **Division Business Analyst**

#### **Company Overview**

The Terlato Wine Group (owned by the Terlato Family) is a holding company operating businesses specializing in the marketing and production of exceptional wines. The Group's flagship company is Terlato Wines, the leading importer and marketer of luxury wines in the United States.

Terlato Wines has a global portfolio of more than 80 brands from world class wine producers in more than 18 countries and controls a 20 percent market share of wines \$20 and up in the U.S. Terlato Wines garners more 90+ ratings than any wine company in the world and is a division of the Terlato Wine Group, the parent company comprising several small businesses specializing in the marketing and production of exceptional wines. Owned and operated by the Terlato family for four generations, the Group also includes the family's winery investments and partnerships in some of the worlds most esteemed wine regions including: Napa Valley; Sonoma County; Sta. Rita Hills in Santa Barbara County; Victoria, Australia; the Rhône Valley in France; Friuli, Italy and; Montalcino, Italy.

#### **Position Summary**

This position is responsible for providing the data, tools and reports to the Sales organization. The incumbent will work closely with the Division Business Manager and Region Managers in a specified geography to manage their account receivables, resolve any discrepancies and keep their statements current. This role will also work to provide additional analysis and support to help the sales organization best focus their time and resources to achieve results. The incumbent is expected to understand and embrace the Terlato family philosophy, passion, and company culture.

#### **Position Responsibilities**

1. Provide Regional support with managing and processing distributor invoices :

- Actively work on statements to maintain aging 45 days under.
  - Coordinate with distributor partners and sales team to make sure invoices are submitted in a timely fashion
  - Support the established marketing brand guidance posted in TradePulse.
  - Communicate any discrepancies to the sales team to prevent ongoing disputes with distributors
  - Submit invoices with clear coding information and all necessary approvals to Accounting for processing.
  - Maintain invoice tracker w/ invoice notes to facilitate statement reconciliations with distributor.
2. Help manage the Region budgets and price structures for the sales organization. Work closely with Sales and Finance to ensure accurate reporting and analysis.
    - Create backup data template to send to all RMs accompanying the P&L report.
    - Work with the Finance team to try to resolve any budget discrepancies that should arise.
  3. Provide on-going Regional support to the field sales teams.

### **Performance Measures**

The position will be assessed on:

- Analytics: Strong ability to capture, manipulate and analyze data and draw the proper conclusions and recommendations.
- Execution: Executes with the proper quality of work and on-time. Gets things done and delivers positive results
- Attention to Detail: Strong attention to detail and to complete quality work products.
- Project management: Ability to manage multiple projects and details in an effective manner consistent with a high quality product
- Judgment: Makes timely and quality decisions.
- Motivation: Highly motivated, self-starter that has high personal goals and expectations and dedication necessary to achieve them.
- Budget Management and Resource utilization: Conscientious and efficient budget management within outlined parameters. Ensures the company resources in the most productive cost effective manner.
- Leadership: Effectiveness in creating a positive, performance driven environment supportive of company goals and values. Effective at providing motivation and inspiration to the Sales Operations team.

- Teamwork: Quality of working relationships with sales management and the ability to work and communicate productively with colleagues and Senior Management.

### **Personal Skills and Qualifications**

The successful candidate will have a demonstrated history of success in supporting Sales and operation roles. Key attributes and skills include:

- Three to Five years business experience with a focus on analysis and reporting
- Highly advance computer skills in Excel and Access
- Relevant experience working in a finance or sales analysis role is essential
- Bachelor's Degree required.

### **Position Data**

Reports to: Division Business Manager

FLSA Status: Exempt