



Job Description

Transformation Manager

The Transformation Manager is responsible for leading and delivering the Finance and People & Culture (P&C) transformation programme(s).

The role exists to improve how work gets done across the Finance and P&C business units by simplifying processes, removing manual effort, strengthening controls, enhancing employee and customer experiences, improving system capability, and embedding a culture of continuous improvement.

The role will develop and own an integrated transformation roadmap spanning people, process, technology and data initiatives. Working through leaders and subject matter experts across the business, the role will drive prioritisation, governance, delivery and change adoption without owning large operational teams directly.

Success in the role will be measured by sustainable improvements in efficiency, effectiveness, employee experience, control, scalability and delivery of business outcomes.

Business Unit: Finance

Department/Team: Finance

Budget: No

Reports To: CFO (dotted CPO)

Direct Reports: Yes

Our Culture, Our Values, and Our Shared Promise

At Summerset, it's the passion and dedication of our people that bring our villages to life. Across all our roles, we work together as one team to create the best possible life for our residents. Our vibrant culture is grounded in our values and shaped by what our people have told us they value most about working here.

Our values: One Team + Strive to be the best + Strong enough to care = **Bringing the best of life.**

B.I.I.G promises you can expect to receive in return for your hard work and commitment to Summerset:

BELONG You will belong to a supportive team dedicated to creating vibrant villages & communities.

IMPACT You will make a meaningful difference in the lives of our residents, giving them a fulfilling & comfortable future.

INCLUSION You will be valued for your unique skills, talents & background.

GROWTH You will join a leader in a growing industry. As we grow, you can grow with us.

Leadership Capabilities

Whether you're leading yourself, leading a team, or leading the organisation, the Somerset Leadership Framework describes that behaviours that make us a high-performing and thriving organisation.

LEADING INCLUSION We lead with respect and kindness, support each other through challenges, and foster inclusive, trusting environments.

LEADING IMPACT We work with purpose, plan and collaborate to deliver, and continuously seek better ways to innovate and improve.

LEADING GROWTH We seek feedback to grow, own our career journeys, and embrace change as a catalyst for learning and improvement.

LEADING FOR SAFETY We strive to lead safe people, safe places and safe systems, to protect our people and contractors, our residents, and our visitors from harm.

Contributions and Key Responsibilities

These are the key activities you'll be responsible for in this role.

Transformation Strategy, Roadmap & Governance

- Establish and maintain a single, integrated finance and P&C transformation roadmap, endorsed by the CFO and CPO respectively
- Convert findings from functional reviews, audits, system assessments and operational feedback into actionable programmes of work
- Challenge existing activities, processes and reporting requirements to identify work that can be eliminated, simplified, automated or redesigned
- Ensure transformation initiatives are aligned with business strategy, capacity and value creation objectives.
- Establish and maintain transformation governance, reporting and prioritisation frameworks.
- Ensure alignment between finance and P&C priorities and the broader Group Digital strategy including participation in the integrated planning forum
- Provide regular reporting to CFO, CPO and senior leadership on respective roadmap progress, risks, and outcomes

Automation, AI & Process Innovation

- Work with business teams to review standard operating procedures to identify areas of simplification and potential automation
- Identify and lead delivery of automation opportunities including:
 - Robotic automation of HR processes including onboarding/offboarding staff, rostering and recruitment
 - Accounts payable automation (e.g. ABBYY, 3-way matching)
 - Workflow and approval optimisation
 - AI-enabled efficiencies where appropriate
- Ensure automation initiatives are scalable, controlled, and aligned to system strategy
- Evaluate emerging technologies and assess their practical application if appropriate
- Reduce manual effort, errors and improve cycle times across current processes within P&C and Finance

Process Improvement & Standardisation

- Lead the redesign and optimisation of end-to-end Finance and P&C processes as agreed with the CFO and/or CPO

Programme Leadership & Prioritisation

- Lead a prioritised portfolio of transformation initiatives, ensuring sequencing aligns with business value and capacity
- Balance competing demands across the respective teams that are required to contribute to the transformation activities
- Ensure resource allocation (internal + external) is aligned to agreed priorities within the respective transformation activities
- Track and report on delivery against milestones, benefits, and outcomes

Systems-Enabled Transformation

- Work with digital services to develop the TechOne roadmap, ensuring P&C and finance priorities are clearly represented, prioritised and implemented
- Contribute to defining and delivering the TM1 end-state for planning and reporting
- Ensure alignment between finance processes and supporting systems (including adjacent systems such as eCase)
- Ensure alignment between HR processes and supporting systems (including adjacent systems such as Optima, Smart Recruiters, etc)
- Drive maximum utilisation of existing systems before introducing new solutions

- Identify opportunities to simplify, standardise and improve workflows
- Develop and embed standard operating procedures, process documentation and controls
- Eliminate duplication, inefficiency and non-value-adding activities
- Drive a culture of continuous improvement across both functions
- Promote process ownership and accountability

Change Leadership & Stakeholder Management

- Develop change strategies for major transformation initiatives
- Influence leaders and teams to embrace new ways of working
- Ensure improvements are successfully embedded and sustained
- Build trusted relationships across Finance, P&C, Digital and operational teams
- Influence without direct authority to achieve programme objectives
- Facilitate alignment between business priorities, technology capability and operational needs
- Act as the primary interface between Finance/P&C and Group Digital Services
- Ensure finance/P&C requirements are clearly articulated, prioritised, and delivered within enterprise technology initiatives
- Act as a trusted advisor to the CFO, CPO and Leadership Teams

Experience, Attributes and Qualifications

- 8+ years' experience leading teams or business initiatives in a general commercial environment that has similarities to Summerset
- Exposure to Finance, Human Resources or Corporate Services environments preferred.
- Experience leading transformation, business improvement, change management or operational excellence initiatives
- Experience delivering transformation across people, process and technology dimensions
- Strong experience redesigning business processes and implementing change
- Experience leading technology or systems initiatives

- Demonstrated programme/project management experience and knowledge of effective frameworks

This job description provides an overview of the responsibilities and outcomes of the role. You may be required to perform job related tasks other than those specified.

