

Portfolio Analyst

Velocity Frequent Flyer and Virgin Australia goals

Australia’s Favourite Airline Group. Leading through loyalty – customers, partners and community

1. Capitalise on growth business opportunities
2. Drive yield enhancement
3. Business cost efficiency program
4. Optimising the balance sheet
5. Set a new standard in customer experience
6. Develop our people to their full potential

Location	Sydney, Grosvenor Place		
Department	Portfolio & Capability	Division	Operations
Group	Velocity	Direct Reports	Nil
Reports to	Portfolio Manager	Manager once removed (MOR)	Manager Portfolio & Capability

Role Summary

- To support the Portfolio Manager with portfolio planning, tracking and reporting
- To undertake monthly Portfolio and project financial reconciliations
- To work with Project Managers to agree project milestones and report on Portfolio schedule
- To undertake monthly resource tracking and capacity planning
- Support Project Managers and Portfolio Manager in the administration of portfolio tools, approval processes and project management framework

Accountabilities and Key Metrics

Accountability	Major Activities	Key Metrics
1. Financial	<ul style="list-style-type: none"> • Portfolio financial review / reconciliation (CAPEX and OPEX) • Financial due diligence re cost code allocation and management • Manage monthly collection for CAPEX efforts • Assist Project Managers reviewing project expenditure / forecasts • Assist the Portfolio Manager to manage portfolio budgets • Management of budgets for small projects • Escalate issues requiring Portfolio Manager intervention 	<ul style="list-style-type: none"> • Delivery of information / production of reports within agreed timeframes • Adherence to financial policies and procedures • Feedback from Project Manager and Portfolio Manager

Accountability	Major Activities	Key Metrics
<p>2. Customer</p>	<ul style="list-style-type: none"> • Collate, review and validate data from weekly / monthly project status reports within timeframes • Produce portfolio report including project updates, financial reporting and forecasts • Maintain portfolio issues, risks, actions and decisions register • Identify portfolio trends and escalate issues requiring Portfolio Manager intervention • Provide portfolio updates to key stakeholders (as required) • Maintain portfolio schedule • Assist Project Manager and Portfolio Manager to track project schedules • Follow up with PMs on schedule / deliverables / milestone achievements • Portfolio resource capacity reporting, planning and analysis • Escalate issues requiring Portfolio Manager intervention • Approvals management to ensure financial approvals in a timely manner • Maintain an approvals pipeline 	<ul style="list-style-type: none"> • On-time, accurate , high quality reporting • Portfolio registers are accurate , maintained and up-to-date • Feedback from Project Manager / Portfolio Manager • Portfolio schedule and registers are accurate , maintained and up-to-date • Accurate portfolio capacity reporting submitted on time • Feedback from Project Manager / Portfolio Manager • Securing required project financial approvals • Feedback from Project Manager / Portfolio Manager
<p>3. People</p>	<ul style="list-style-type: none"> • Stakeholder engagement / facilitation – follow up with project stakeholders on portfolio deliverables • Provide consistent and timely feedback to Project Manager/project stakeholders as required • Actively seek and maintain relationships with Project Managers, business, IT and other key stakeholders 	<ul style="list-style-type: none"> • Effective relationships with project stakeholders and departmental managers and leaders • Communication with stakeholders is always timely, professional and clear • Positive feedback from project stakeholders
<p>4. Operational</p>	<ul style="list-style-type: none"> • Ensure all project team members are aware of the correct project procedure & process and encourage compliance in the most practical and efficient manner • Manage portfolio and project files • Coordinate cross project, portfolio meetings (facilitated by Portfolio Manager) • Assist Portfolio Manager to prepare presentations / reports for senior 	<ul style="list-style-type: none"> • Accurate and complete information • Project compliance • Effective presentations prepared • Effective meeting coordination / preparation / facilitation (as required) • Effective presentations prepared

Accountability	Major Activities	Key Metrics
	management <ul style="list-style-type: none"> • Business support – assist with the arrangements of project meetings, workshops, events 	
5. Continuous Improvement	<ul style="list-style-type: none"> • Continuously improve and update reporting processes working with Portfolio Manager and Project Managers • Support the administration of portfolio processes, tools, templates • QA of portfolio as directed by Portfolio Manager e.g. issues, risks, actions, decisions, dependencies management 	<ul style="list-style-type: none"> • Feedback from Project Manager / Portfolio Manager • Positive feedback from project stakeholders
6. Safety	<ul style="list-style-type: none"> • Adhere to safety standards, operating procedures, policies and regulations 	<ul style="list-style-type: none"> • All company standards are adhered to as per company policy • Compliance with V Learn requirements

Decision Making Authority

<ul style="list-style-type: none"> ▪ Portfolio schedule, financial, status, capacity reporting ▪ Financial due diligence requirements ▪ Engagement approach with key stakeholders 	<ul style="list-style-type: none"> ▪ Portfolio recommendations e.g. escalations / prioritisations ▪ Budget / forecasting recommendations
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Values and behaviours

We think customer

- Our customers are at the heart of everything we do
- We are passionate about creating an outstanding flying experience
- We deliver consistently high service internally and externally

We do the right thing

- We always put safety first
- We act with integrity and honesty
- We create a sustainable and inclusive environment for our people and the community

We lead the way

- We lead by example
- We have the courage to think differently
- We innovate

We are determined to deliver

- We do what we say we're going to do
- We are responsive
- We are committed to excellence in all we do

Together we make the difference

- We work together to achieve success
- We consider our impact on others
- Our people set us apart

Expertise

	Must have	Great to have
Knowledge/qualifications	<ul style="list-style-type: none"> • Understanding of Project Management principles and methodologies (e.g. Prince 2, PMBOK) 	<ul style="list-style-type: none"> • Knowledge of airline / loyalty processes and systems • Project Management certification
Skills	<ul style="list-style-type: none"> • Well-developed financial reconciliation / reporting skills • Effective interpersonal, written / verbal communication skills • Able to work autonomously, prioritise and manage own time • Advanced excel skills 	<ul style="list-style-type: none"> • Well-developed scheduling skills, including using Project Management software e.g. MS Project
Experience	<ul style="list-style-type: none"> • Proven track record of portfolio analysis / coordination • Experience working in teams with multiple stakeholders • Demonstrated experience operating 	<ul style="list-style-type: none"> • Previous portfolio coordination / analyst experience >5 years • Experience in the airline industry • Previous project delivery experience

	Must have	Great to have
	in an environment that uses structured project management principles (e.g. Prince 2, PMBOK)	<ul style="list-style-type: none"> • Previous PMO experience

Key interactions

Internal	All business stakeholders, IT, Finance and Group Project Office / Group Initiatives Office
External	External suppliers, vendors and partners