

Professional Job Position Description

Section I: Position information

Effective date	2026-03-13	☒ Update only	☐ Classification review
Position title	Business Insights & Operations Lead		
Position number	998553		
Classification level	C		
Position affiliation	☐ AUFA ☒ Excluded		
Location	Virtual		
Department	PowerED		
Reports to	Director, PowerED (999049)		

Position summary

Briefly describe the main purpose(s) of the position.

The Business Insights and Operations Lead will play a crucial leadership role in ensuring the success of PowerED's financial performance which drives our product strategy and product life-cycle decisions. The Business Insights and Operations Lead is passionate about delivering exceptional client experiences, is detail-oriented, possesses strong analytical skills, has a deep understanding of contract management and procurement and process improvement through optimal financial performance.

Duties and responsibilities

Organize by key responsibility area and include % of time spent where possible.

Business Analysis & Forecasting (50%):

- Develop, maintain, and improve financial models to support budgeting, forecasting, and strategic planning.
- Analyze revenue trends, operational costs, and key financial metrics to provide actionable insights.
- Prepare financial reports and presentations for senior management.
- Conduct scenario and sensitivity analyses to assess financial risks and opportunities.

Contract Management & Procurement:

- Manage the end-to-end contract lifecycle, including summarizing, negotiation, execution, and renewal processes with AU's central finance department.
- Ensure compliance with contractual terms, industry regulations, and company policies.
- Collaborate with legal, finance, and operational teams to optimize contract terms and mitigate risks particularly around contract and purchase order thresholds.

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- Establish and maintain vendor relationships, overseeing procurement strategies to ensure cost-effectiveness.

Process Improvement & Compliance:

- Identify and implement improvements to financial and procurement processes to enhance efficiency and accuracy.
- Ensure adherence to internal controls, corporate governance, and regulatory requirements.
- Support internal and external audits by providing necessary documentation and analysis.

Business Insights and Strategy (30%):

- Conduct/leverage market research and analysis to understand customer needs, industry trends, and the competitive landscape to support pricing decisions
- Collect and analyze data from various sources, including customer feedback, usage metrics, and market research, to identify opportunities for product enhancements and new training offerings.
- Collaborate with the Director, PowerED to ensure strong financial performance metrics and forecasting for quarterly and annual budgeting.
- Monitor product performance metrics and KPIs, providing regular reports and insights to track the effectiveness of training offerings.

Cross-Functional Collaboration (20%):

While this role is primarily internally focused there are several key relationships and functional areas the Lead will need to collaborate with regularly to be successful.

- Collaborate closely with finance business partners, procurement and external clients to set goals in support of sales ambitions.
- Partner with the product development and instructional design team to communicate financial considerations regarding budget allocation and ensure course development remains on track.

Occupational health and safety**Employees:**

Responsible to participate in the AU OHS program as required.

Supervisors:

Responsible for awareness of one's OHS Responsibilities as an AU employee and supervisor, for participating in the AU OHS Program as required, and for ensuring the participation of employees in the AU OHS Program as required.

See: <https://ohs-pubstore.labour.alberta.ca/li008>

Classification factors

Communication

The Business Insights and Operations Lead plays a key leadership role in advancing strategic decision-making across the organization. This position engages regularly with senior institutional leaders—including Directors, Deans, Associate Vice-Presidents, and the University Executive—to provide high-level insights into financial performance and to inform both PowerED's product strategy and the broader institutional program and portfolio mix.

The role is responsible for synthesizing complex financial and market data into clear, actionable intelligence that supports executive decision-making. This includes leading the development and articulation of business cases, guiding data visualization and interpretation standards, and ensuring that insights are communicated effectively through concise, executive-level briefings and presentations. The Lead ensures alignment between business insights, strategic priorities, and investment decisions across the unit.

Internally, this person provides leadership in coordinating cross-functional collaboration with key institutional partners, including Finance, Procurement, University Relations, and Faculty units. This includes establishing effective communication channels, aligning operational priorities, and ensuring that product development and delivery efforts are informed by both institutional objectives and market demand.

External Engagement and Relationship Management

A critical component of this role is the strategic oversight of external relationships that support the growth and sustainability of the PowerED portfolio. The Lead is accountable for developing and maintaining senior-level relationships with clients and partners, positioning PowerED's value proposition in alignment with client needs and market opportunities.

This includes providing leadership in business development activities, guiding engagement strategies, and overseeing the client lifecycle from initial engagement through to long-term partnership. The successful candidate will ensure that client insights are systematically captured and translated into product and service enhancements, driving both client satisfaction and revenue growth.

In addition, the role holds accountability for the integrity and effectiveness of associated operational processes, including procurement oversight, contract management, financial reconciliation, and performance monitoring. The Lead ensures that these functions are executed with a high degree of rigor, transparency, and alignment with institutional policies and strategic objectives.

Supervision

The Business Insights and Operations Lead initially will have no direct reports but will work in a highly collaborative and cross-functional team. The expectation is that through progressive success in driving results the Lead may expand this team adding roles across the functions.

In addition to direct reporting lines the Lead will often guide cross functional project teams within PowerED and across the institution aimed at driving client success initiatives, and product insights that will support decisions in credit and non-credit programme areas.

Within budget parameters set by the Director of PowerED the Lead will often delegate certain activities and executables to service/support areas within the institution as well as to external service providers and is expected to supervise the work products of these entities.

Impact of service or product

Taking direction from the Director of PowerED, the Business Insights and Operations Lead will drive impact across the following key aspects of the PowerED business unit:

- Advanced financial modeling and forecasting
- Contract negotiation and management
- Procurement strategy and vendor management
- Risk assessment and mitigation
- Data analysis and reporting
- Budgeting and financial planning
- Regulatory compliance and governance
- Strong problem-solving and critical-thinking skills
- Effective communication and presentation abilities
- Ability to manage multiple projects and deadlines

The position is central to achieving PowerED's revenue generating mandate through successful delivery of client success outcomes, and insights that support product decisions which expand revenue generating capacity.

Independence of action

The incumbent is expected to work with minimal supervision and make appropriate decisions regarding operational and administrative activities aligned to the goals set out for the role and within the overall strategic direction of PowerED and to a broader extent the institution overall.

The ability to identify and analyze operational issues and to brief the appropriate internal staff, including the director, is an important aspect of this role.

This role is expected to make decisions in the best interests of course performance while balancing these with the best interests of the PowerED business unit and will often make these decisions in consultation with the Director.

The level of interaction and engagement with business and industry requires speed and quick decision making to be responsive, as such the role is expected to operate with process improvement and efficiency in mind.

Complexity

This role is a strategic complement to the director in that it is expected to help drive results across PowerED's business performance, and while these are aligned to business goals the activities associated are often very diverse. Additionally, the role is expected to achieve results while also building out a team, new processes to support sustainability and scalability of the functions within the scope of the functional areas managed.

The Business Insights and Operations Lead will be expected to develop an operating level understanding of PowerED's three critical sales verticals to ensure strong financial performance.

The Business Insights and Operations Lead will be required to develop reports and communicate data/insights to support PowerED budget decisions.

Planning

Strong project management and planning skills are vital to this position. The incumbent will support the director in strategic planning for the unit and assist in developing, drafting and executing the various planning outputs including the unit Strategic Plan, Product Strategies, and Product Roadmaps.

The Business Insights and Operations Lead will also need to be adept at operating within a goal setting framework that places emphasis on setting and communicating key performance objectives.

Signatures for section I

Incumbent signature		Date Select a date.
Supervisor signature		Date Select a date.

Section II: Qualifications

Qualifications

Includes education, experience, skills, abilities, and any other special qualifications required. The qualifications relate to the position not the incumbent.

Education: A bachelor's degree in a relevant field such as business administration, commerce, or a related discipline is required. Higher education qualifications, such as an MBA, postgraduate degree or certifications aligned to the specific competency areas defined by the role are advantageous.

Experience: Minimum 5-7 years of experience in similar role or related role is typically expected. This involves managing internal strategic relationships, developing, and implementing process improvements, and analyzing data to derive insights.

Financial Analysis and Forecasting: Strong skills in financial modelling and forecasting are important. The ability to understand and address business unit needs, build and maintain strong relationships, and provide excellent customer service is crucial.

Contract Procurement and Management: Proficiency in contract management practices is essential. This includes experience in developing, drafting and conveying contract terms; ensuring contracts remain compliant, experience in procurement strategy and a strong sense of risk assessment and mitigation.

Data Analysis and Insights: An understanding of data analysis and the ability to derive actionable insights from data is valuable. Familiarity with analytics tools, data visualization, and reporting techniques is important.

Communication and Leadership: Excellent communication skills, both written and verbal, are necessary to effectively interact with clients, stakeholders, and team members. Leadership abilities, including the capacity to motivate and collaborate with others, are important for this managerial role.

Problem-Solving and Strategic Thinking: Strong analytical and problem-solving skills are crucial to identify challenges, propose innovative solutions, and make informed decisions. Strategic thinking is also important to align client success and product strategies with the university's goals.

Knowledge of Higher Education: Familiarity with the higher education sector, including the challenges and trends in online education, can be advantageous for understanding the unique requirements of Athabasca University's clientele.

Signatures for sections I and II

Department Head signature		Date
Executive Officer signature		
Human Resources review		Date Select a date.