

# FP&A MANAGER

Education Logistics, LLC · Finance



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Location: Remote-Friendly (prefer Missoula, MT)

Type: Full-Time, Exempt

Department: Finance

Reports To: CFO

Edulog is the pioneer and leader in K-12 student transportation management software, serving school districts across North America for over 40 years. Our comprehensive platform helps districts optimize bus routing, ensure student safety, and deliver better transportation experiences for millions of students daily. Backed by Serent Capital, we're entering an exciting growth phase with investment in go-to-market capabilities.

## ABOUT THE OPPORTUNITY

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We are a 40-year-old, founder-led SaaS company at an important inflection point in our growth. With 100 employees today and an active acquisition strategy, we are building the finance function our business deserves. This is a high-visibility FP&A role where your work will directly inform board-level decisions and operational strategy – not get lost in layers of process.

This role reports directly to the CFO and partners closely with the Controller and department heads across Sales, Marketing, and Operations. You will inherit a foundation of financial data and systems, and you will build the analytical infrastructure – forecasting models, business partnering relationships, and reporting frameworks – that carries us into our next chapter.

## POSITION SUMMARY

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The FP&A Manager is a high-visibility, individual contributor role reporting directly to the CFO. This exempt position is responsible for owning the full planning and forecasting cycle, serving as the primary finance business partner to the Sales organization, building executive and board-level reporting, and supporting the financial integration of acquired companies. The FP&A Manager exercises independent judgment across all key financial planning activities and operates with significant autonomy in shaping the analytical infrastructure of a growing SaaS business.

## KEY RESPONSIBILITIES

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### PLANNING & FORECASTING

- Own the company's annual budgeting and quarterly forecasting processes end-to-end, coordinating inputs across departments and delivering a consolidated financial plan to leadership

- Build and maintain a rolling forecast model that reflects the company's SaaS business drivers – ARR, churn, expansion, headcount, and cash
- Develop scenario and sensitivity analyses to support strategic decision-making, including pricing changes, hiring plans, and M&A activity
- Maintain and improve the company's long-range financial model as the business evolves through organic growth and acquisition

## BUSINESS PARTNERSHIP – SALES & REVENUE

- Serve as the primary finance business partner to the Sales and Revenue teams, owning the intersection of finance and go-to-market strategy
- Design, model, and administer sales compensation plans, including quota setting, commission calculations, accelerators, and SPIFFs – ensuring plans are financially sound and operationally executable
- Partner with Sales leadership on bookings forecasting, pipeline analysis, and deal economics, providing the financial lens on win/loss, discounting trends, and contract structure
- Support pricing and packaging decisions with financial modeling and margin analysis

## REPORTING & ANALYTICS

- Build and maintain dashboards and executive reporting packages, including a CEO-level view of business performance, pipeline health, and key operating metrics
- Develop and own board and investor-ready materials – including monthly board packages, investor updates, and supporting financial narratives – translating operational data into clear, compelling financial stories
- Run ad hoc financial analyses to support leadership decisions, with the ability to move quickly from raw data to a clear recommendation
- Define and track the company's KPI framework, ensuring consistent definitions and reliable data across Finance, Sales, and Operations

## SYSTEMS & INTEGRATION

- Lead or co-lead the integration of financial systems following acquisitions, including chart of accounts alignment, ERP onboarding, and intercompany eliminations
- Drive the selection, implementation, and optimization of FP&A and reporting tools (e.g., financial planning software, BI/dashboard platforms) to replace manual processes with scalable infrastructure
- Partner with IT and RevOps on the ERP ↔ CRM data integration, ensuring financial reporting reflects accurate bookings, revenue, and pipeline data
- Identify and implement AI-enabled workflows to accelerate financial analysis, automate recurring reports, and surface insights faster – including leveraging AI tools for data modeling, narrative generation, and anomaly detection

## ACCOUNTING COORDINATION

- Coordinate with the Controller on the monthly close process, including review of the close checklist, variance explanations, and flux analysis

- Maintain working familiarity with GAAP revenue recognition (ASC 606) and SaaS accounting fundamentals sufficient to bridge FP&A and accounting in reporting and analysis
- Support external audit and tax processes by providing financial models, forecasts, and supporting documentation as needed

## M&A & INTEGRATION SUPPORT

- Provide financial due diligence support for acquisition targets, including financial model review, quality of earnings analysis, and integration cost modeling
- Own the post-acquisition financial integration workstream – aligning budgets, harmonizing reporting, and consolidating the combined company's financial view
- Build and track integration synergy models, reporting progress against targets to senior leadership

## REQUIRED QUALIFICATIONS

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- 5–8+ years of progressive FP&A experience, ideally in a SaaS or technology company
- Demonstrated experience owning a budgeting and forecasting process, not just contributing to one
- Experience as a finance business partner to a Sales or Revenue organization, including direct involvement in comp plan design and quota modeling
- Track record of building board-ready or investor-ready financial presentations
- Experience with financial systems implementation or migration (FP&A tools, ERP, BI platforms)
- Expert-level financial modeling in Excel; experience with dedicated FP&A platforms (Adaptive, Anaplan, Pigment, or similar) strongly preferred
- Strong command of SaaS metrics – ARR, NRR, CAC, LTV, payback period, Rule of 40 – and the ability to explain them to non-finance audiences
- AI fluency – specifically the ability to work with AI-generated financial analysis, evaluate outputs critically, and integrate AI tools into planning workflows

## PREFERRED QUALIFICATIONS

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- Prior exposure to M&A financial due diligence or post-acquisition integration
- Familiarity with CRM data and reporting (Salesforce preferred) and the ability to work across the ERP ↔ CRM boundary
- Experience with sales compensation design and administration
- Comfortable with AI-accelerated workflows and actively exploring how AI tools can improve speed and quality of financial analysis

## CORE COMPETENCIES

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- Builder mentality: energized by creating structure where little exists, not frustrated by ambiguity
- Commercially minded: thinks about the business holistically, not just the numbers
- Pragmatic: able to right-size models and processes for a 100+ person company rather than over-engineering for enterprise scale
- Collaborative and credible: earns trust with Sales, Marketing, and the executive team by being a thought partner, not a gatekeeper
- Strong written communication: able to write clear, concise financial narratives for board decks, investor updates, and executive summaries
- Sufficient accounting fluency to coordinate with the Controller on close and variance analysis without hand-holding

## WHAT WE OFFER

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- Competitive salary and performance bonuses
- Comprehensive health, dental, and vision insurance
- Flexible work arrangements
- Professional development opportunities
- 401(k) with company match
- Collaborative and mission-driven culture

## HOW TO APPLY

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Interested candidates should submit a resume and cover letter to [careers@edulog.com](mailto:careers@edulog.com) with the subject line "FP&A Manager – [Your Name]". Applications will be reviewed on a rolling basis. For questions, please contact the HR Department at [hr@edulog.com](mailto:hr@edulog.com).

**Education Logistics, LLC**  
Missoula, Montana  
[www.edulog.com](http://www.edulog.com)

EduLog is an Equal Opportunity Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, disability status, or any other characteristic protected by law.