

TRADE PLANNING LEAD

Core information

Location: Bracknell head office <input type="text"/> with blended working and an expectation to travel to other locations as the role requires.	Lines of business or shared capability area: Waitrose Commercial
Reports to: Head of Value & Trade Planning	
People Management: Yes <input type="text"/>	
Assignment Management: Yes <input type="text"/>	
Partnership Level: Partnership level 5 <input type="text"/>	Manager's Partnership level: Partnership level 4 <input type="text"/>
Number of direct reports: up to 4	Partnership level(s) of direct reports: Partnership level 6 <input type="text"/>

About the John Lewis Partnership

The Partnership is the UK's largest employee-owned business and home to our two well-loved retail brands – John Lewis and Waitrose, as well as expanding into new areas beyond retail.

We aren't an ordinary business, though. The Partnership is different because everyone who works here isn't just an employee. We are Partners, with a shared responsibility for our success, and we share the rewards when we're successful.

Everything we do is powered by our unique Purpose: **Working in Partnership for a happier world.** Our Purpose inspires our principles, drives our decisions and acts as our guide, so that everything we do contributes to Happier People, Happier Business and a Happier World.

Critical purpose of the role

As Trade Planning Lead you will lead a high performing team who are accountable for defining and owning the Trade Plan and driving improved performance.

This involves:

- Embed a customer-centric approach in all trade planning decisions.
- Strategically plan all secondary space to support the integrated plan and maximise commercial returns.
- Develop and own an agile, rolling 20-month Trade Plan that balances integrated priorities with optimal commercial performance.
- Ensure Trade Plan agility to proactively respond to evolving trading conditions and customer needs, within legislative and systemic bounds.
- Relentlessly track performance, manage in-flight changes, and drive continuous improvement for the total Trade Plan's impact.
- Drive cross-functional collaboration to ensure the Trade Plan achieves maximum customer/commercial impact and operational effectiveness through end-to-end planning and execution.
- Ensure clear communication of the Trade Plan to foster understanding and ownership across all stakeholders.
- Monitor competitor activity and commercial trends to inform performance analysis and identify new opportunities.
- Lead the end-to-end delivery of all key calendar, cultural, and smaller events with a customer-first focus.
- Collaborate with the Value team and Buyers to enhance promotional effectiveness.



- Partner with the Value and Trade Planning Reporting lead to embed continuous improvement through action-oriented Post-Implementation Reviews (PIRs).
- Represent the Trade Planning team in all forums providing timely action orientated updates and decisions.

Primary Outcomes & Accountabilities

ROLLING MONTH COMMERCIAL TRADE PLAN - DEVELOPMENT & DELIVERY

Develop, define and deliver an agile rolling 20 month Trade Plan (covering events,secondary space, promotions) which delivers for customers and commercially and is as operationally efficient as possible.

This involves:

- Planning short-medium term key commercial activity (up to 20 months out) - eg. coordinating delivery of events (Christmas, Easter, valentines),supporting loyalty proposition (eg. co-ordinating MyWaitrose promos)
- Defining and measure Commercial Trade Planning objectives
- Provide end-to-end visibility of commercial activity and requirements and define clear, measurable Commercial objectives based upon our integrated plan
- Measure performance vs. plan on an ongoing basis, holding stakeholders to account for delivery against the plan and build learnings into future planning
- Ensuring accurate forecasting and analysis is aligned to Commercial finance
- Planning FOS,secondary and seasonal promotional space in a timely manner to ensure the customer impact and commercial returns are maximised (ie ensures promotional plans can be built into supplier negotiations where appropriate, provides opportunity for the media team to elevate opportunities and for the marketing and content teams to fully support with effective communications and bold POS
- Ensure legal compliance on Trade Plan activities ie. GSCOP, HFSS, Trading Standards

EFFECTIVE CROSS FUNCTIONAL WORKING

- Work with key stakeholders, particularly Marketing Planning and Content teams, to ensure activities are effectively communicated
- Work closely with the Category Trading, Own Brand and media teams to build out commercial Trade Plan.
- Work with retail and product supply to ensure that Trade plan is as operationally efficient as possible
- Ensure the Plans are clearly communicated and well understood by stakeholders.
- Measure performance vs. the plans, holding stakeholders to account for delivery and build learnings into future planning and financial forecasts
- Drive effective decision making through defining clear decision making criteria and escalation processes

Measures of success

Effective delivery of rolling month commercial Trade plan

Delivery of shared financial and customer Targets

Stakeholder feedback

Partner

- Commercial teams seek out support for insight and analytics - pull not push
- Sought and delivered Feedback for self and others using Contribution
- Completion of all Legal compliance documentation on Workday
- Quality & strength of talent pool; consistent line of communication to resource planning function, enabling succession planning and career development for Partners



- Escalation of risks and opportunities to interdependent teams and Trade Board

LEADERSHIP

Inspire and develop a high performing team, ensuring all Partners are clear on their roles, have targets and development plans in place and are well supported in their roles and career development.

Act in accordance with the Partnership’s purpose and democratic principles, constructively participating in co-ownership, and demonstrating to customers and each other that it is a better way of doing business. Share your knowledge, experiences, ideas and opinion to improve the Partnership, speaking honestly and frequently.

Invest in your personal and professional development to achieve your potential, by doing more, doing better, or doing different. Continuously engage with and actively contribute to your Profession.

Take responsibility for actively engaging with change

Create the conditions for all Partners to thrive, make their best contribution and achieve their potential.

Appreciate what different life experiences bring to the Partnership and the value this adds to unbiased and smarter decision making.

Set the tone, context and outcomes for the team with the voice of the customer at the heart.

Enable the conditions for Partner opinion to be heard and acted upon.

Skills

- **Business strategies:** Thinks for the long term whilst making sense of the current climate. Cuts through any issues in order to reach the defined goal and ensures continued alignment to current business objectives. Puts these strategies in place for peers and team and in doing so, creates a culture where everyone contributes.
- **Stakeholder management:** Identifies who is impacted by or involved in your goals/objectives and therefore who is key to achieving the desired successful outcomes. Understands the motivations and priorities of these stakeholders and takes these into account in order to build and manage sustainable relationships. Can anticipate potential challenges stakeholders may bring and puts plans in place to achieve collaboration.
- **Builds effective teams:** Builds high performing teams through integrating a diversity and blend of skills and personalities and supporting a trust based environment. Empowers the team to achieve success with a shared sense of purpose and clarity on team goals.
- **Decision making:** Identifies the issue/opportunity, then gathers the relevant information and alternative viewpoints to form options and evaluates to drive an informed outcome.
- **Critical thinking:** Interprets evidence and information to develop well reasoned arguments for thinking and can readily draw on evidence to justify a chosen course of action. Can think clearly when presented with multiple pieces of information and gets to the nub of an issue in order to make a well informed judgement.

Qualifications & Experience (where applicable)



Essential

- Experience of leading and developing high performing teams
- Very strong analytical skills and critical thinking
- Experience in a retail or commercial environment
- Buying or Category management experience or equivalent
- Financial acumen
- Stakeholder management and influencing
- Experience of process development and implementation

Desirable

- Degree level or equivalent level

Version	Created/updated by	Date
<i>1.0</i>	<i>Ash Wellfair & Clancy Marschner</i>	<i>January 2026</i>