

... More tan 15 years learning from  
finance transformations

## FP&A VS. CONTROLLING MANAGEMENT

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Carole A. Izard – Madrid, 04/07/2017  
Managing Partner

- WHO I AM....
- WHAT I WOULD LIKE TO SHARE WITH YOU....

## QUESTIONING WHY....



Wondering why I had been quite always involved in transformations, I came to the conclusion that there is a **simple reason** for starting with a finance transformation in companies:

- It's all about supporting the business and driving performance

## WHAT DO I TRUST.....



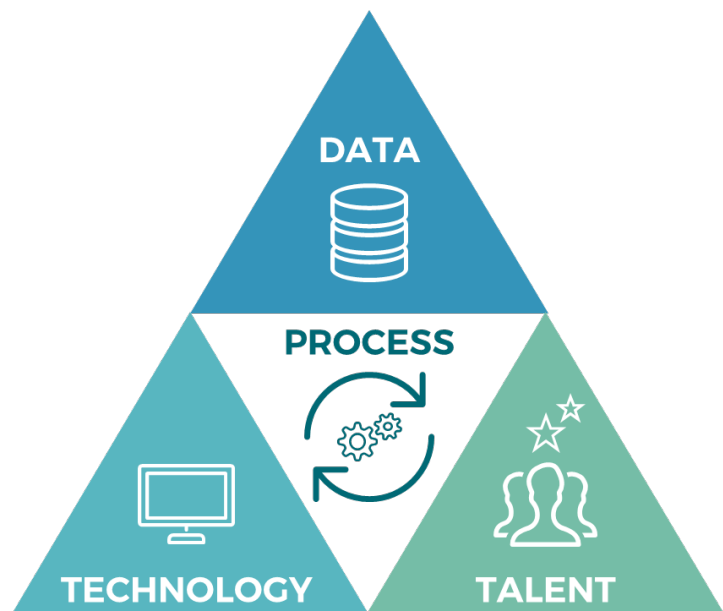
- Within the CFO's organization, the **responsibility** for tracking, assessing and reporting corporate performance falls to the Financial Planning and Analysis -FP&A area
- We are **specialized** in analyzing and planning for the future, wearing multiple hats and identifying various improvement strategies
- A valued FP&A specialist is someone who has the **ability to engage with and influence** the full breadth of top management – not just CFO – ensuring they have the necessary information

## THEN, WHAT ABOUT OUR ROLE ....

- First of all, no doubt that the role of an FP&A professional is largely a **new and evolving role**
- FP&A leaders are considered and expected to be the **Finance “ambassadors”** to Business Leaders.
- Embedded across the business, we are **a crucial part of decision making** in areas: planning, making resourcing decisions, measuring success, approving investments, and much more.
- FP&A moves beyond the traditional budgeting process to **link strategic and operational planning**.
- We play a **critical role** in the organization and with our business partners as we are the primary driver for financial planning, forecasting, reporting, and business analysis,.
- An optimized FP&A team, with the lead of executive leadership, has close ties with Accounting and Operations and applies its expertise to facilitate **a collaborative business environment**.



# FUNCTIONAL KEY SUCCESS FACTORS....



- Promote the **opportunity** for transforming finance department to a **business partner**
- Enhance the **company agility** to make effective managerial decisions in ever-changing environment
- Get a **new and refreshing look at Performance Management** to achieve the full potential of your company
- Optimize the **service delivery platform** to maintain competitive advantage and become a requested agent
- Implement **cost optimization** approaches while retaining **value added functions** within Finance Performance Management
- **Learn** to use the benefits of integrated business planning and cope with its challenges
- Embrace **real-time analytics** and intelligence for delivering smarter business decisions
- Explore **new agile technologies** that can make finance transformation an achievable reality
- Support the change management program
- Turn the **human factor** into added value in financial management
- Gain the effectiveness through “**internal potential**” of people by building highly-skilled and motivated professionals

# WHAT HAS CHANGED FOR ME DURING THIS PROCESS?

## CONTROL MANAGEMENT EXPECTATIONS...



Analyze the **WHAT**



Analyze the **PAST**



**MANAGE** the numbers



Work the **DETAILS**



Perform for **FINANCE**



Driven by **COMPLIANCE**



Based on **FINANCIAL STATEMENTS**



Working **IN-HOUSE**



## FP&A ORIENTATION...



Analyze the **WHY**



Focus on the **FUTURE**



**GRASP** the numbers



Control the **GLOBAL PICTURE**



Be the **KEY BUSINESS PARTNER**



Think different, be **INNOVATIVE**

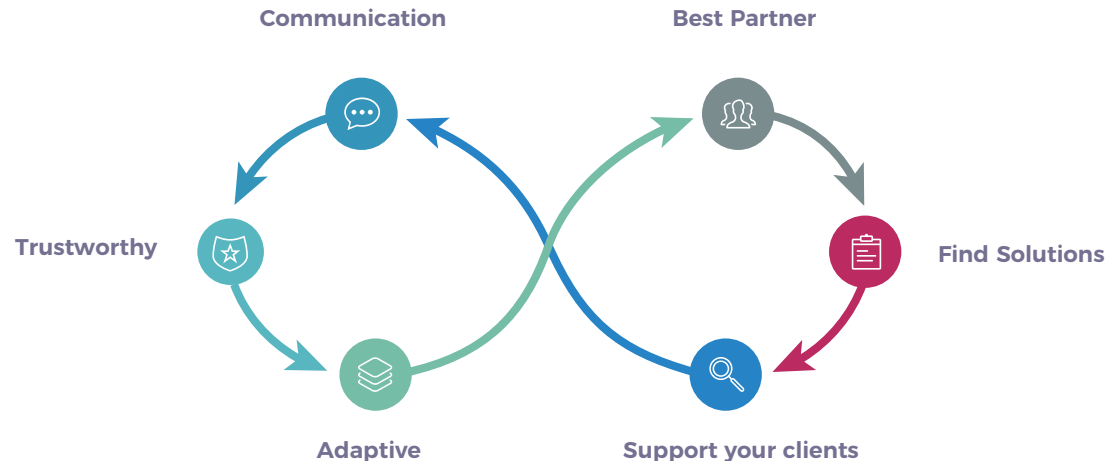


Learn from the **BUSINESS**, KPIs and Metrics



Understand **THE MARKET** and global **TRENDS**

# PERSONAL KEY SUCCESS FACTORS....



- Ability to communicate with and gather information from your partners
- You own the expertise of financials principles and processes across the company
- You are a truly great, flexible, quick and adaptive player
- Able to coordinate FP&A tasks with the corporate calendar or the assigned deadline , you are a process keeper
- You provide reports, presentations, build budgets, forecasts, annual plans and so on... you provide solutions and insights
- You have the ability to receive, analyze, integrate and consolidate assumptions and data from business units, synthesize information to create conclusions, alternatives and recommendations
- You own great technical aptitudes to make things happen faster and on a reliable way
- You have the intelligence and natural curiosity but specially desire to learn from your colleagues

## my FEELINGS.....

- Everything is changing and changing fast
- You are just at the beginning of a new journey, it will be long but challenging and exciting
- You are entitled to make things happen
- You are lucky enough to get this transformation opportunity in your own and well-known company
- This will provide you a new environment, new objectives, and new ways of working
- Take advantage of it and capitalize your knowledge
- Be supportive, build your perfect team, not the perfect people
- And grasp this opportunity to evolve and progress.





“The secret of change is to focus all of your energy not on fighting the old, but on building the new”

**Socrates**

Contact us: [info@fincatadvisors.com](mailto:info@fincatadvisors.com)

T: +34 676 423 206