

THE CFO PLAYBOOK ON STRATEGY: HOW TRANSFORMATIONAL CFOs PLAN FOR THE LONG TERM

October 4, 2017

CFO
An Argyle Company

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SPEAKERS

Kenneth Fick
Senior Manager, Accounting and Transaction Services
MorganFranklin Consulting

Bryan Lapidus
Associate Director, CFO Advisory
Allegiance Advisory Group

Nilly Essaides
Senior Research Director
The Hackett Group

Moderator: Joe Fleischer
Editorial Director, Finance Channel
Argyle Executive Forum

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1. To what extent are companies relying on their finance teams to help prepare and articulate their strategic plans?

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2. How can a finance team increase its value to an organization through planning?

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3. What challenges do companies encounter most often when setting goals beyond the next fiscal year? How can CFOs take the lead in overcoming these challenges?

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4. What are the clearest indications that a company's approach to planning needs to change?

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5. What role(s) should the CFO take on as a company prepares to change its approach to planning?

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6. How can CFOs work effectively with colleagues throughout their organizations to gather valuable information, as well as garner support, for the plans they develop?

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7. With regard to planning, what new methodologies or technological advances should finance leaders be aware of?

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8. What mistakes should finance leaders avoid as they refine their planning processes?

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9. What is the most important advice attendees ought to remember from today's discussion?

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QUESTIONS AND ANSWERS



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