

CFO Case Study 1

Elevate CFO's board presence and executive-level thinking

CFO's Challenge

- Not showing up in the boardroom as the financial leader of the organization
- Untapped expertise that could help the board make better informed decisions

Background

- Very successful, rapidly growing business in a high-risk industry subject to volatility
- CFO with strong technical skills, bandwidth to personally grow and strong desire to develop his financial leadership capabilities

Upside Coaching Potential: It's more than being a better accountant!

- Transition CFO from accountant to financial leader
- Leverage financial and business acumen to help the company profitably grow

Root Causes & Underlying Development

- **Fear of not knowing the answer; only speaks up when 100% confident in the answer**
Coaching: It's not about having the answer, it's about participating in the conversation, providing objective data and experienced insights.
- **Uncomfortable operating in "grey space" where there is no readily available answer**
Coaching: Become comfortable operating where there are no checklists or monthly reconciliations; ease anxiety and build courage through repetition.
- **Lack of strategic thinking**
Coaching: Develop tailored assignments to stretch strategic thinking bandwidth and confidence.

Coaching Results

- CFO showing up in the boardroom with courage and presence to guide the board through complex financial and business matters
- Board and CEO have full confidence in the CFO as the financial leader of the organization