

CFO AS FINANCIAL BUSINESS PARTNER– CINDY MARCH

START WITH WHY



Emboldened – Cool Word, What Does it Look Like?

Studies on motivation show that to have happy, productive, and engaged employees their work environment needs to provide three things:

1. **Mastery:** help people find what they are good at; how they can best play to their strengths; and show them you believe in them.
2. **Purpose:** develop a shared vision of how their work directly connects to a purpose – it matters that they showed up!
3. **Autonomy:** give them some space yet be at the ready to provide an assist with problem solving, improving, and innovating.



Courage; the confidence to present ideas; have a voice; own something; be accountable

CAREER JOURNEY

“A smooth sea never made a skilled sailor” - FDR

The Throughline

- Two decades at TDG (with last 10 years in finance seat)
- Continue the deliberate scope creep
- Build out a portfolio
 - Professional Services
 - CPG
 - eCommerce
- Consider legacy and find connection along the way – seek to be trusted, respected, and remembered

TLDR: I meet companies at inflection points; I can quickly orient, connect, adapt, and lead through change

Founder or Leadership Transition

- TransDevelopment Group – Specialized Industrial Dev
- ESCI – Public Safety Consulting
- Stafford Business Group – Real Estate Investment
- Bookbyte - eCommerce

Values Theme: Always a Steward, Be Curious, Bring Energy (keep showing up!), Have Impact

Complete Business/Product Pivot

- Belmont – Specialty Office Services

Values Theme: Always a Steward, Be Curious, Bring Energy (keep showing up!), Have Impact + Practice Adaptability

Infrastructure Build and Fundraise

- Food & Beverage Innovations - CPG
- Ruby Jewel - CPG

Values Theme: Always a Steward, Be Curious, Bring Energy (keep showing up!), Have Impact + Greater Good

PARTNERSHIP & BUSINESS ADVISORY

CFO as Financial Business Partner

1st Principles: To create a long-term, sustainable organization, you need to get the **best return** on the resources put behind initiatives

- Have a foundation: Strategic Plan, targets, metrics.
- Develop a financial plan that aligns with strategy -> financial stability -> grow the will and means to invest for the long-term.
- Assess and manage risk along the way; understand trade offs.
- Remember your customers – internal and external. F & A as a repository – we like to chase the details!
- Get the data -> organize the data -> **share** the data -> **collaborate** to clear the roadblocks and allow teams to act on the data.
- Create or refine the tools to help teams prioritize opportunities.
- Measure, measure, measure. Report, report, report.

Think cash flow!

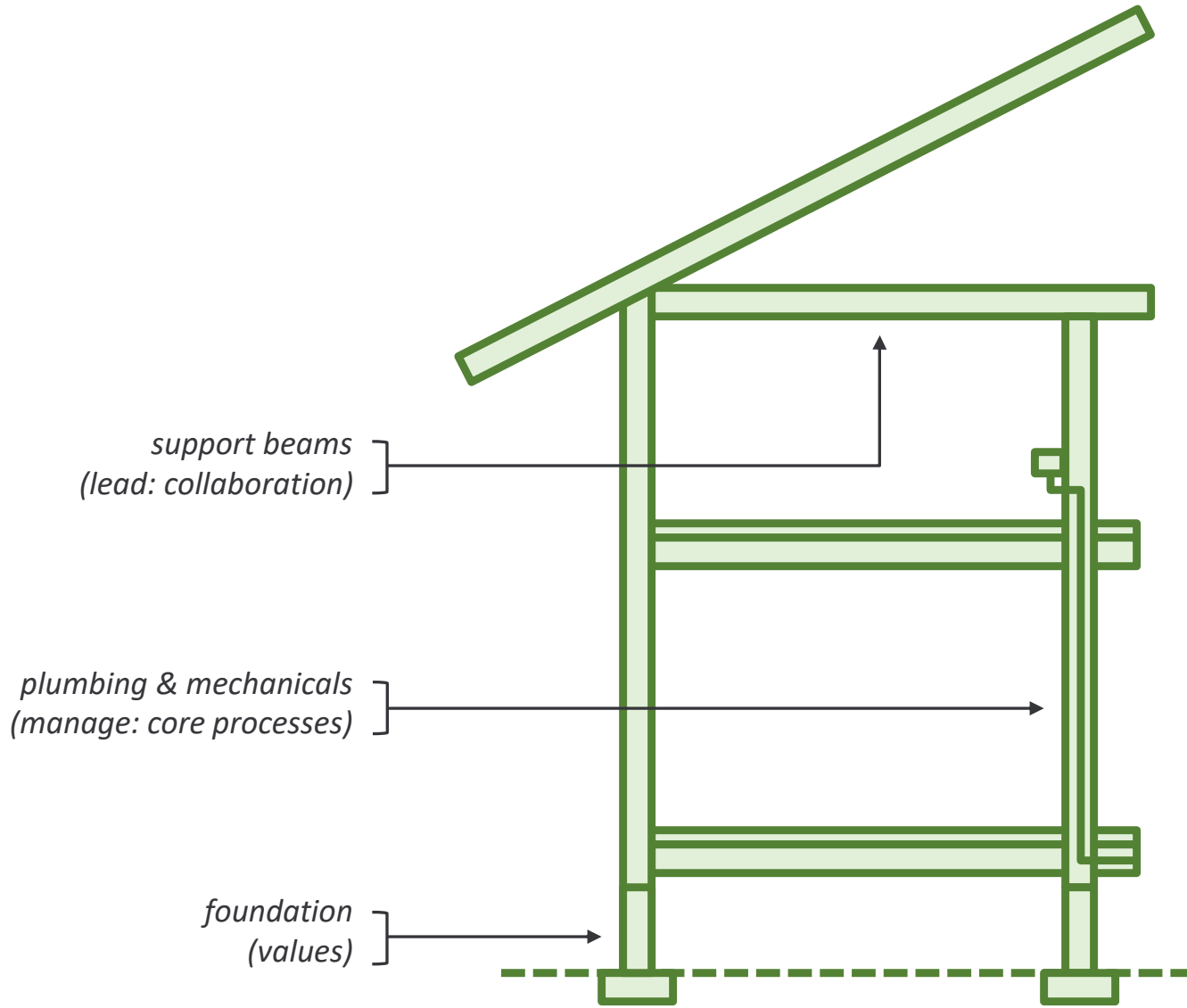
LEADERSHIP APPROACH & VALUES



Leader vs. Manager – Hybrid?

How do you ‘ensure the right work is being carried out to accomplish organizational goals?’

- Great leaders set vision and ambitious goals.
- Great managers take that vision, and those goals, and translate them into tactical daily actions.
- Both approaches are needed in a changing environment. Particularly one with a mission to grow.
- Both approaches should be grounded in values.

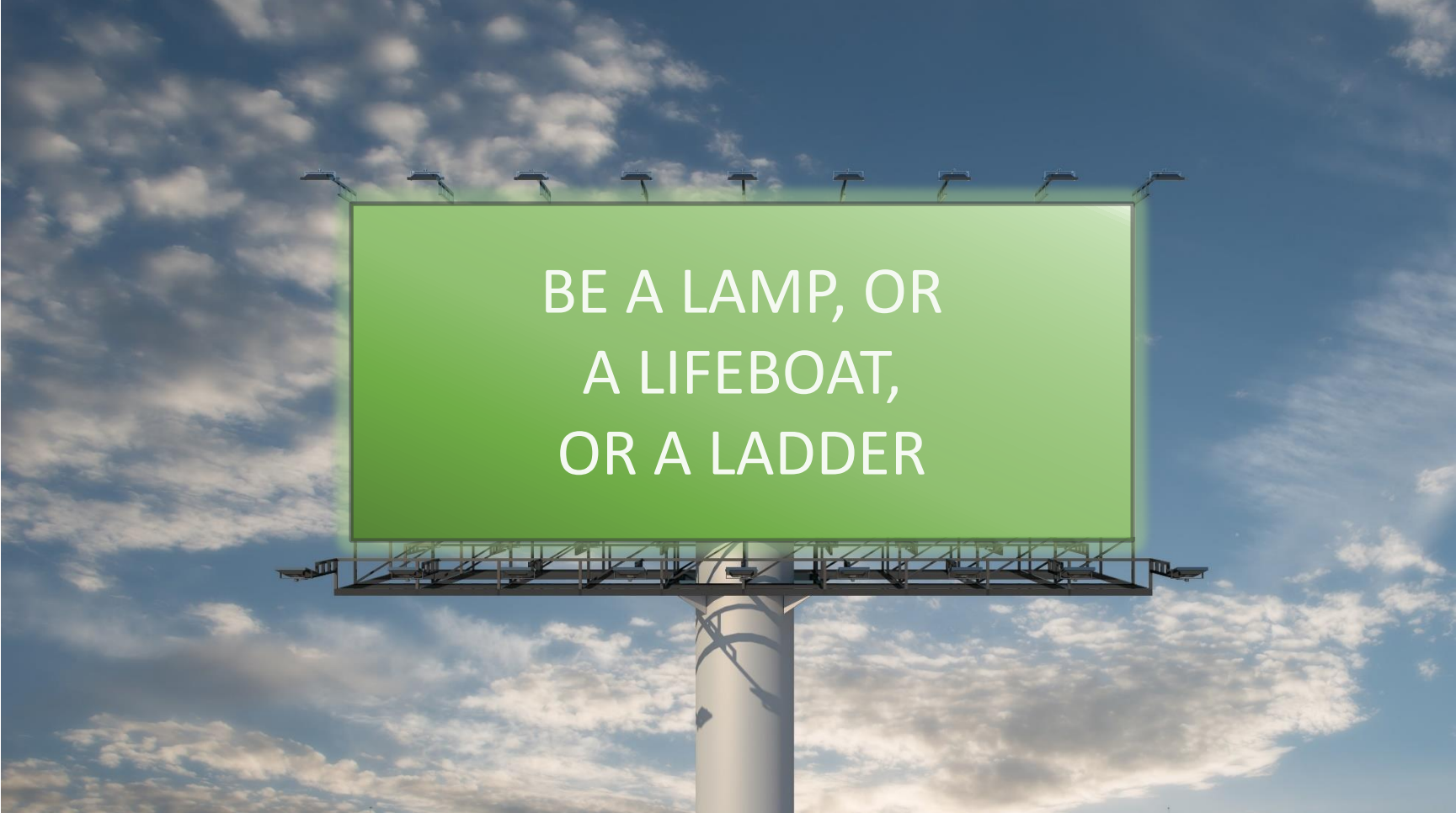


The Concrete Hows & Core Processes: Near-Term

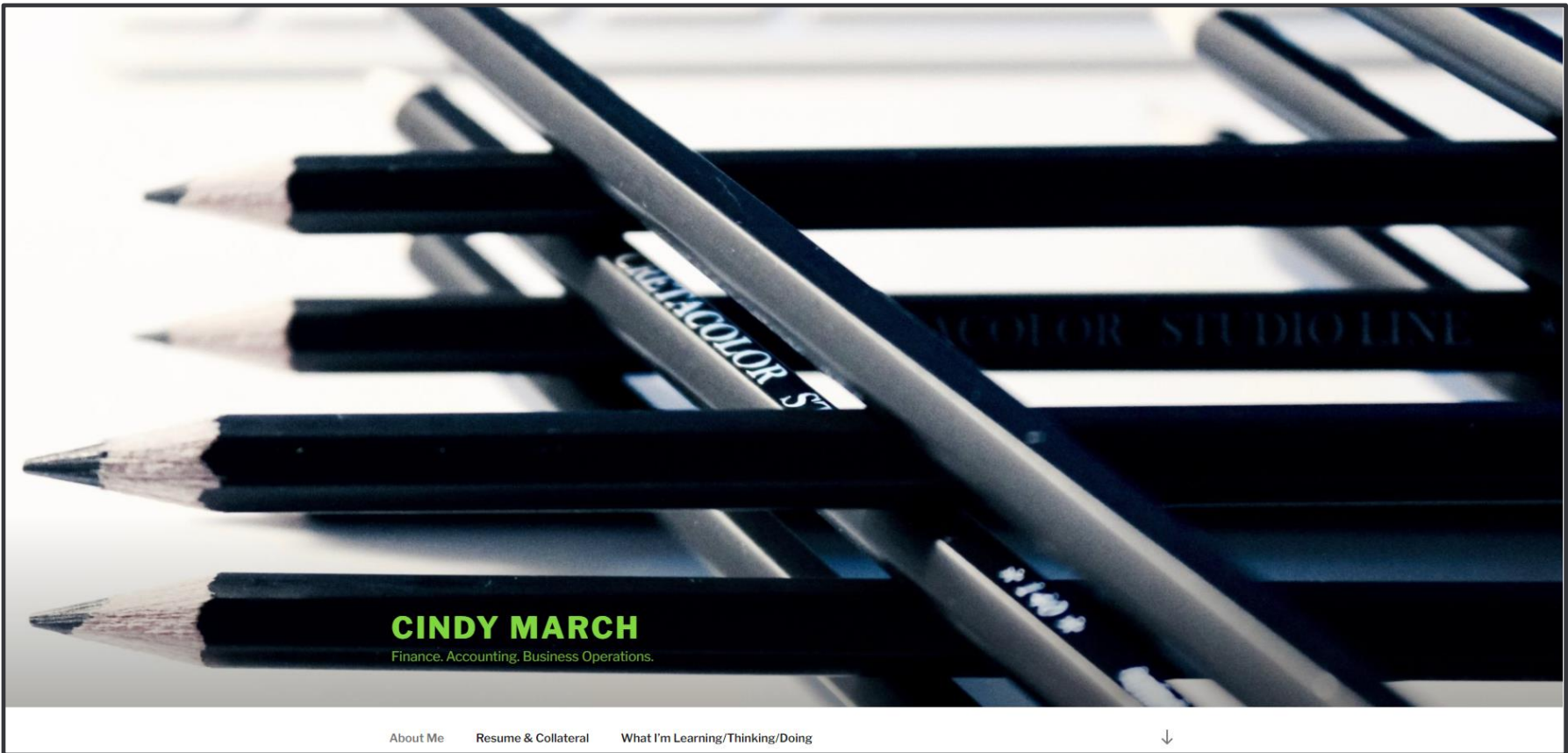
- Get to know the direct team(s): who, roles & goals, what does success look like to a person.
- Create direct team charters to include Strategic Plan initiatives, have career and 'how we work with each other' sessions.
- Study the close, the historicals, the budget, the forecast, scope out financial plan.
- Assess & plan for risk areas, focus first on next 60 days.
- Learn the business model and understand organization and team cadence.
- Weave in key partner communications; ask the right questions.
- Get up to speed on technology and systems for immediate use.
- Pinpoint how the money moves (clients, suppliers, stakeholders)?
- Always, always, always look for the moments of connection, levity, and broader org values alignment!

The Concrete Hows & Core Processes: Mid- to Longer-Term

- Refine knowledge of the business model or organization and shift to the inside baseball of the industry.
- Continue technology and systems learnings - consider longer term use case.
- Continue to expand key partner communications now that you have context.
- Work with users of statements to refine reporting packages – three statements, dashboards, other tools to track status. Think user-centric!
- Dive into the external relationships (clients, suppliers, stakeholders)?
- Look for opportunities in learning curve to pepper in vision and lofty goals. Ask more questions!

A photograph of a billboard against a blue sky with scattered white clouds. The billboard is supported by a tall, white cylindrical pole. The billboard's frame is visible, with several spotlights mounted along the top edge. The central part of the billboard is a solid green rectangle containing white text.

BE A LAMP, OR
A LIFEBOAT,
OR A LADDER



CINDY MARCH

Finance. Accounting. Business Operations.

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[What I'm Learning/Thinking/Doing](#)



“Pencil has never let me down.” – Aaron Draplin

Additional collateral materials: cindymarch.com