Best Practice in Financial Planning and Analysis

The Winning Formula for FP&A Storytelling

FP&A

Add Credibility

Define Your Audience

Bring Your Passion

Craft Your Story

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① Introduction

Storytelling has always been the cornerstone of the FP&A function, and its importance continues to grow.

In a world of increasing data where management has less and less time to process it, the ability to present insights has never been more important. Indeed, during our International FP&A Board meetings, we discussed that in a world of increased automation, the ability to tell a story would possibly become the key differentiator of any FP&A professional.

Storytelling is the way that FP&A teams can translate complex data-fueled insights into digestible nuggets that are understood by the whole organization.

A good story is not just a presentation of information, it also contributes valuable insights and inspires action.

Effective FP&A storytelling drives actions that increase the value of the organization for its stakeholders. At its core, FP&A storytelling:

- Guides the audience towards your identified conclusions based on data;

- Gets the desired core message across and drives action;

- Minimizes distractions from the core messages.

In this paper, we lay out the key elements of FP&A storytelling and provide practical guidance to help you improve your storytelling skills.

2 The winning formula for FP&A storytelling

There are four elements in the winning formula for FP&A storytelling. It is not just about data visualization.

When the all-time great data stories are discussed, the late Hans Rosling is usually mentioned. His presentation on "Global population growth using blocks to visualize the statistics" is one of the most memorable data talks and has become an essential staple of MBA courses around the globe. Hans did not use any flashy visuals, nor special effects, he just presented a very complex topic in a way that even a 10-year-old would understand. In fact, a 10-year-old would not only comprehend, but also engage with, learn from, and take something away at the end.

During a quick trawl through LinkedIn, we can find hundreds of posts that discuss telling stories with data. However, the majority focus on using data visualization methods. As we have learned from Hans Rosling, there is so much more to data storytelling than this. In Figure 1 below, there are four elements to an FP&A story.

Define Your Audience **+** **Craft Your Story** **+** **Add Credibility** **+** **Bring Your Passion** **=** **Winning Formula for FP&A Storytelling**
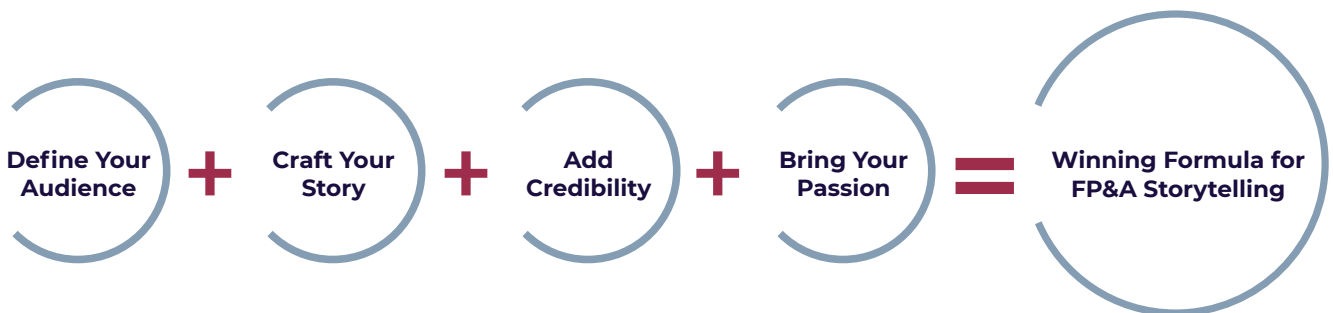
Figure 1. The winning formula for FP&A storytelling

FP&A storytelling is part-art, part-science. It is a combination of data analysis, graphic design, and cognitive psychology. It needs practice, it needs refinement, it needs sharp wit, and the ability to react and adapt to each unique situation. No two versions of the same story are likely to be told the same way. Below we have provided some practical guidance on data storytelling.

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③ How can these elements be used to craft a convincing and engaging story?

3a. Define your audience. What do you want them to do and feel after your story?

- How do they like to communicate? What is their communication style?

- What is their level of data literacy? How familiar are they with the subject?

- How difficult and how expensive is your proposed solution? Will it cause resistance in the team?

Plan your message beforehand. This will give you direction and structure throughout the storytelling process.

FP&A professionals are always under considerable time constraints. They do not always have time to think before writing and sending an email or presentation. Yet, planning the message is the essential part. It saves time by providing structure upfront. It ensures that the message is relevant, and most importantly, it helps ensure the message resonates with its audience.

Understand your target audience to define your core message.

Always take time to place yourself in the shoes of your target audience. To whom are you telling your story? Are they supportive or antagonistic? What do they need to hear? What is the challenge they are looking to solve?

Once you have defined this, you can start to craft your core message in a way that will resonate with your audience and perhaps even shift their perspective. However, there are additional dimensions to consider beyond a rational argument. Two more aspects, from classical change management theory, need to be addressed. Emotional (how you make the audience feel) and political (how you can improve their reputation amongst their colleagues). To help you ensure you have all bases covered, follow this simple framework - Write down what you want your audience to think, feel, say, and do after they have heard your story.
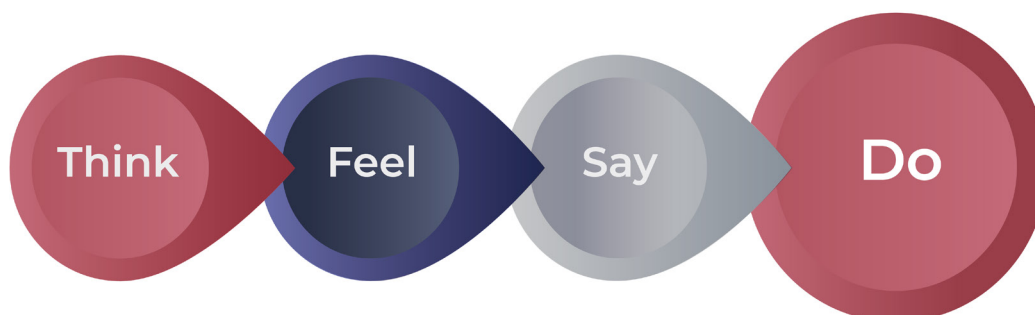

Figure 2. Communications checklist

Mirroring an audience's communication style will greatly increase the probability that they retain the core message.

Communication is an event that happens in the mind of the receiver. Your goal is to, firstly, ensure that their understanding is the same as yours, and, secondly, that they are energized by your story. To achieve your goals, you need to tell your story in their style.

There are two ways of structuring your communication, from the top-down or from the bottom-up. The top-down approach, based on the pyramid principle (Figure 6), is where you start with the conclusion and explain how it was reached. This is particularly useful for an audience with a low attention span, such as a TV audience or top-level management. This is an extremely effective structure to present insights, but it comes at a price, the story can feel a bit robotic, and it loses the emotional weight of a traditional start-to-finish storyline.

The storytelling structure will be covered in more detail in the next section.

Beyond structuring, the language used is important. There are three ways that an audience member can receive a message:

- Visually

- Aurally

- Sensation

People will use a combination of these reception methods when listening to a story. However, usually, one of these methods will dominate. There are subtle clues in body language that can identify audience types. Visualizers will move their eyes upwards, auditory processors will look to the side, and those who receive by sensation will look down.

While it is not always possible to research your audience in advance to know this level of detail, it is important in storytelling to be able to react and adapt to your audience. Look out for these signals early on and adapt your language to resonate with your audience. For example:

- For visualizers, you can describe an image. When describing an increase in daily sales in the supermarket, you can describe how busy the tills are;

- For auditory processes, you can describe the sound of ringing tills; and

- For sensory processors, you can describe the euphoria of tills filled with coins.

As part of mirroring, consider the audience's level of data literacy when delivering your message.

When finance talks to finance, the conversation happens between two highly numerate participants, meaning jargon can be dropped in and still be understood. Percentages and trends can be mentioned, and the other party will likely be doing the same calculations in their head.

However, only a small percentage of FP&A stories are told to other finance audiences. Other departments may not be as adept at reading and interpreting data. Whilst messages should never be oversimplified, you should ensure the language used is one that your audience speaks. For complex messages, work with them at their pace. Explain what it means for them.

3b. Craft the story to maximize impact.

Using a storytelling structure.

Several publications on storytelling recommend a basic structure to the story, including a beginning, a middle, and an end. In the FP&A Trends article, this concept was expanded further, suggesting that an FP&A story be based around a story arc. A story arc is a term for the path a good story follows. Practice using the same structure when telling your FP&A stories.

Starting with a **character and desire** that represents the business, brand, or market context, we can go on to describe something that has happened or an **incident**, and how this has led to a **conflict** or a problem. The **climax** is the most dramatic part of the story and explains the impact on business performance and the key stakeholders of the business.

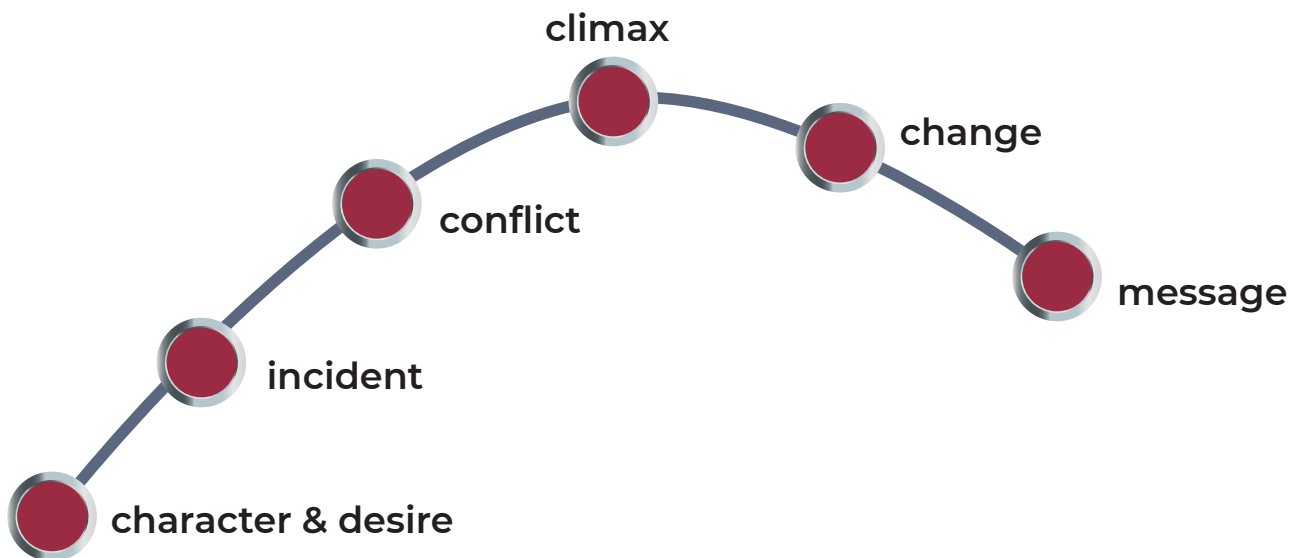The **climax** sets the scene to recommend actions for **change** and **conclusions**.

Figure 3. Components of a story, from FP&A Trends article *by Olga Rudakova*

This type of structure is commonly used in books and movies. Therefore, it will resonate with the audience, gain their attention, and be remembered long after the story has been told.

One of the challenges an FP&A storyteller faces is to present an unbiased story based on the data. There is a tendency to fit the data into a pre-existing narrative and thus fall into a bias trap. Be sure to start with solid data analysis, and only after that is completed, start to build the message and craft the story. Watch out for assignments that request data to support an existing narrative. Analysis needs to be first, the message and the story will always follow.

When going from an oral story to a visual story, or presentation, the importance of the structure becomes even more apparent. With slides and other visual aids, the audience has a greater capacity to decipher your message. To avoid distractions from the core message, your presentation materials need to be clean and free of clutter. All visuals need to be easy to follow, and the same structure discussed above should be implemented.

One test you can run before presenting materials is to look at the slide headings and/or subheadings in isolation. Are they just descriptive? Do they bring insights and recommendations? When looked at collectively, do they read like a paragraph or a collection of random sentences? If they read concurrently, your presentation will have a logical flow and will be easy for your audience to follow.

It is important to also consider how your visualizations will be perceived. Will the audience be able to determine the core message immediately? Too often, we see default Excel charts pasted into a presentation. They may make a lot of sense to the FP&A analyst who prepared them but not to anyone else. Be sure to simplify your data visualizations and include only relevant context so that they can be easily digested. Figure 4 demonstrates the difference between an Excel chart and an action-oriented presentation.
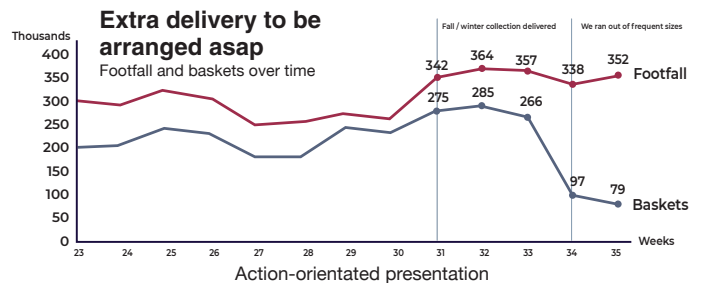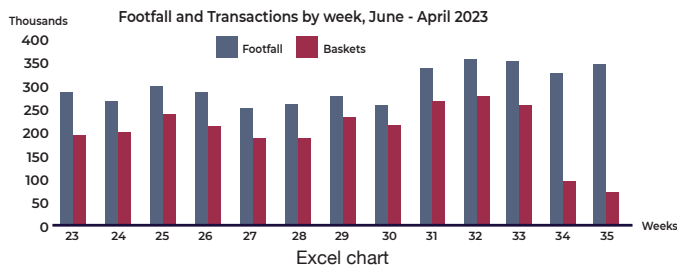
Figure 4. Comparison of excel chart to action-orientated presentation.
Source: The Digital North American FP&A Board: The Art and Science of FP&A Storytelling

Storytelling methods are effective as they reach both the visual vortex, responsible for quick, instinctive information processing, and the prefrontal cortex, responsible for cognitive function, the slow processing of complex information. Storytelling methods, if needed, can be combined with the more traditional communication structures of FP&A, for example, the value drivers framework.

Merge the structure of storytelling with traditional FP&A frameworks.

In the 1980s, Alfred Rappaport defined the concept of value drivers, as factors that increase organizational value. This is a starting point for defining metrics that evaluate performance and can be used as a basis for defining management actions that increase organizational value.

The value driver framework can also be used to reduce the number of metrics and reports in circulation. In a few organizations that we have worked with, we have seen the number of monthly financial reports reduce from over 3,000 to only a few hundred.

In Figure 5, we have provided an example of the value drivers applicable to professional services organizations. The professional services business model is dependent on experts providing advice to their clients, and their time spent being charged for. The maximum possible revenue is the total number of hours available, in other words, 100% utilization, multiplied by the maximum hourly rate and any additional premiums that can be charged. See the left-hand column in Figure 5.

The next bar, maximum rate with actual utilization, assumes that actual utilization is less than the maximum capacity, and it is all charged for at the maximum possible rate. If staff hours are not fully utilized, it is likely that there is a shortage of client work, therefore, the required action is **to sell more**.
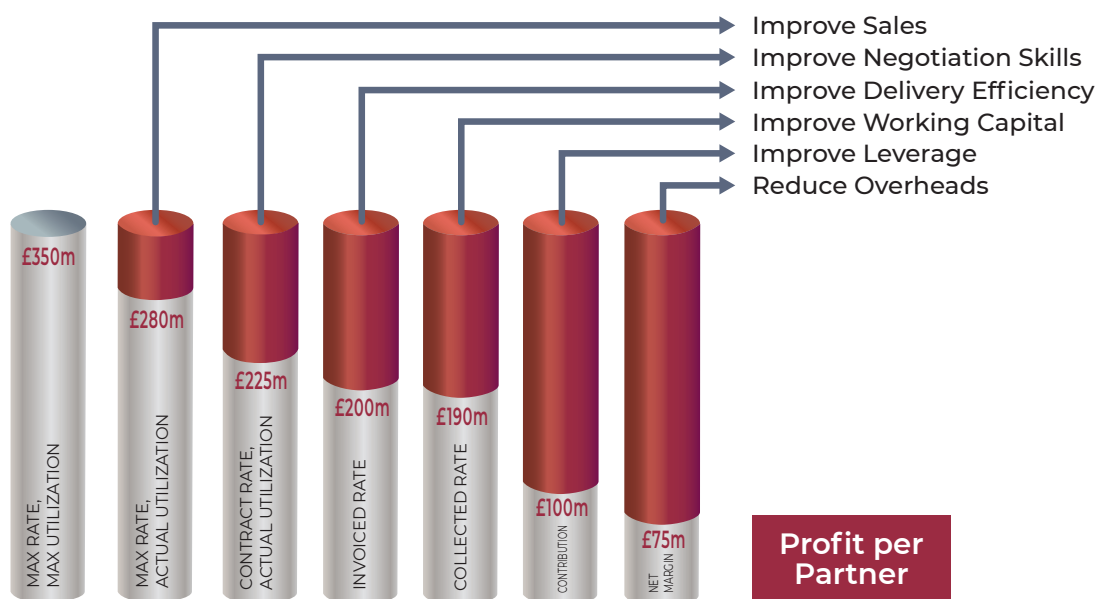

Figure 5. Example value driver framework for a professional services organization

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By using this type of framework, you can focus on where your organization has the greatest potential for improvement and the management actions required to improve profitability and value. More importantly, it gives you a structure for crafting your story in a succinct and easy-to-follow manner.

The mutually exclusive, collectively exhaustive (MECE) principle.

The MECE principle is used to organize the elements of your story into logical groups and helps break complex issues down into smaller, digestible pieces.

- Mutually exclusive: Each group is distinct, and there is no overlap.
  The message can be kept simple.

- Collectively exhaustive: All possible options are covered, giving your story a high level of credibility.

This is a useful framework that organizes information to ensure completeness and avoid duplication. In FP&A storytelling, it involves identifying key elements, categorizing them, and eliminating overlap or gaps. By providing a structured approach, the MECE principle helps storytellers to communicate complex ideas and engage their audience. It's a powerful tool for clear communication and effective problem-solving.

Consider using the pyramid principle to synthesize your story from its elements.

Once you have defined your story elements, they can be brought together using the **pyramid principle**. This is based on a book by Barbara Minto and is a method that is used by major management consultancies. The pyramid principle helps you summarize and sequence the elements of your message into a coherent story.

This method is especially useful when presenting to executives with little time available. Executives are trained to look at the big picture and care more about the answer than the details behind it, choosing to only dive into the analysis when more reassurance.
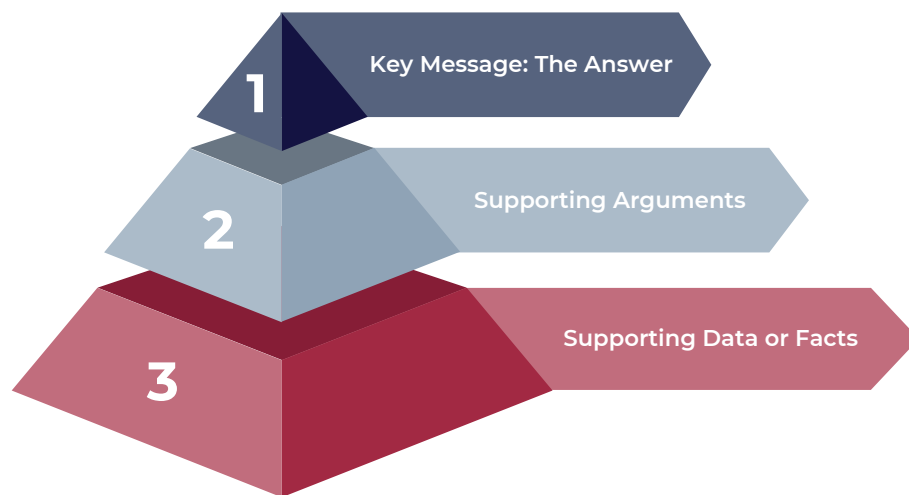

Figure 6. Communications using the pyramid principle

By using the pyramid principle, you ensure that:

- Your recommendation is memorable;
- You present a structure that is easy to follow;
- You back up each statement with data.

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It is, of course, possible to apply a bottom-up pyramid method of communication. As part of the MECE framework, you have already created the elements of your story following a natural thought process. You have built the initial fact base, analyzed the data, and come to a conclusion.

This approach is, however, not as memorable for corporate audiences since they need to pay attention throughout the whole story. Secondly, if one of the arguments in your sequence fails to convince the audience, your whole argument breaks down. For example, consider this phrase:

"Men are mortal, Socrates was a man, therefore Socrates was mortal."

If you do not believe that Socrates was a man, you will not necessarily agree with the conclusion that he was mortal. If you followed the top-down principle, your argument is still believable as you do not break a chain of thought.

3c. Add credibility to back up your story.

You are telling a story. You need your audience to believe you. When watching a movie, the audience is going through a process known as **suspension of disbelief**. During the show, the audience is prepared to believe what is in front of them. However, when the show is over, they know it to be fiction, and aliens are not really invading Earth. This, in the context of FP&A, is a disastrous outcome. What is presented needs to be believed long after the story has been told. To achieve this, there are two main credibility sources that can be leveraged.

i.   Evidence and data; and
ii.   Leverage research of notable experts.

Evidence and facts provide indisputable evidence.

Base your story on robust data analysis and quality insights. We need to ensure there is no ambiguity when interpreting data.

Enhance your credibility by leveraging the research of notable experts.

Further credibility can be gained by citing research from notable experts in the field. Mentioning these recognizable names can lower levels of skepticism and reduce distractions from the story.

To enhance your own credibility with the audience, make sure you are introduced to them properly, citing your relevant experience and achievements.

A story needs a combination of both types of credibility. As a rule of thumb, 70% of the credibility should come from your work, and 30% should be borrowed.

3d. Present with the right mix of gravitas and levitas, and bring your passion.

Gravitas and levitas are important qualities in FP&A storytelling. The words «gravitas» and «levitas» are both derived from Latin. «Gravitas» comes from the Latin word «gravis,» which means «heavy» or «weighty.» «Levitas» comes from the Latin word «levitas,» which means «lightness» or «lack of weight.»

Gravitas is about executive presence, telling your story with an authoritative tone. If you have too much gravitas, your storytelling style will be very authoritarian. You will end up relying on your authority to drive action, but you may not hold any authority among your audience.

Levitas is about being relatable, more human, and connecting to your audience on an emotional level. It is useful in situations where you need to nudge your audience toward your way of thinking. You are convincing them by being their friend but with too much levitas, you may not be taken seriously.

A balance of gravitas and levitas can create a story that is both engaging and credible, leaving a lasting impression on the audience. But most importantly, **you need to tell your story with passion.**

When you are passionate about the topic, your audience will pick up cues. They will notice your voice modulation. They will be energized by your enthusiasm. It is your passion that will be infectious. It is your passion that will engage the audience in something they are not interested in. It is your passion that will drive actions after the story has been told. **Your passion is the final ingredient of the winning formula for FP&A storytelling.**

4 Data Visualization Maturity Model

Through our own research as well as member conversations, FP&A Trends Group has identified trends in maturity levels within organizations. These are summarized in Figure 7.

The best-in-class organizations, known as **Visualizers @ Scale**, can both generate instant information in large volumes and provide a high degree of user personalization to definitively meet their decision requirements. They also have the capability to provide exploratory rather than declarative information. Some organizations can generate a high volume of standard reporting, referred to as **The Factory**. Others have FP&A teams who can craft a story and create tailored visuals for specific purposes, but these are considered to be a one-off task due to the manual nature of the reports involved. These fall into the **Infographic Artist** category.

Data Visualization Maturity Matrix

Speed to generate (vertical axis: Low to High)

THE FACTORY (High speed, Low customization)
- Standardized dashboards are sent to all users
- Low variations between reports with limited interactivity
- Visualizations not designed around user objectives
- Updates available in near-real-time

VISUALIZERS @ SCALE (High speed, High customization)
- Dashboards tailored for the requirements of each stakeholder
- Visualizations within the dashboards designed around data communication principles
- Reports consider the context of each stakeholder s business objectives, and are highly interactive
- Updates available in near real

STARTING THE JOURNEY (Low speed, Low customization)
- Standardized reports for all users
- Limited or no visualizations, with no interactivity
- Produced manually, with no single data source
- Excel-based, with a high effort to refresh / update

INFOGRAPHIC ARTISTS (Low speed, High customization)
- Visualizations are tailored to each stakeholder group, and considers the context of their business objectives
- Manually produced, and painstakingly slow to produce/ refresh
- Often prepared as a one-off

Level of customization for each stakeholder / business user (horizontal axis: Low to High)
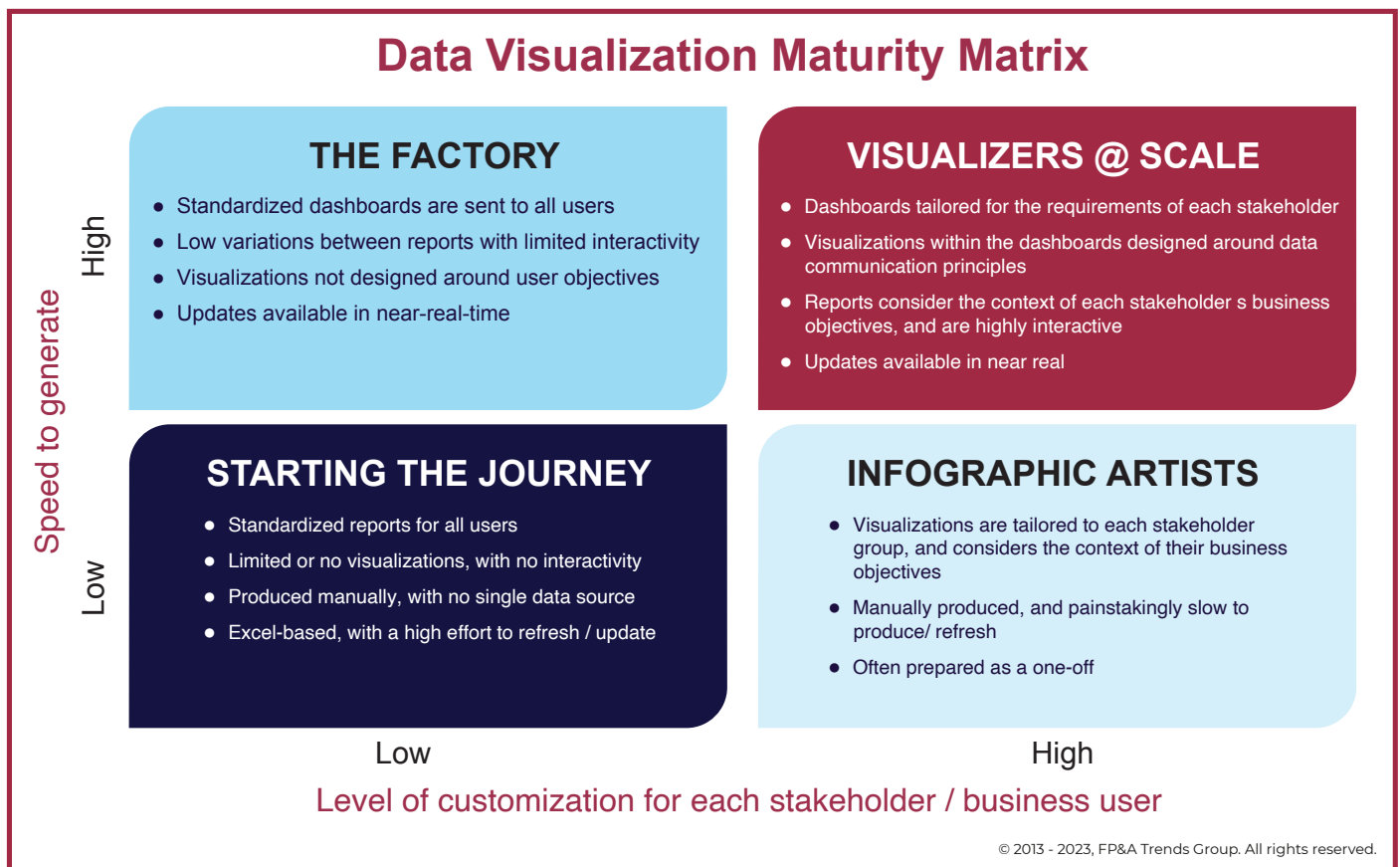
Figure 7. FP&A Trends Data Visualization Maturity Matrix

When planning your data technology roadmap toward optimum storytelling, you should be aiming at the top right-hand corner. As we have seen in section 3, an effective story needs data points and evidence tailored to each unique audience. It also needs to be generated rapidly so that your audience receives the information while it is still relevant.

Many FP&A teams will fall into the bottom right-hand corner as they embark on their journey. This is where you are manually tailoring your supporting materials for your audience. In the short term, this is a good thing as you are thinking about what might be needed and developing your storytelling skills. However, it is not sustainable in the long-term owing to resource and scalability constraints. This is where investment in data technology plays a part.

We have expanded our Data Visualization Maturity Model further, as shown below (Figure 8). There are three dimensions to consider:

I. Speed to create: Can visuals be created at pace?

II. Visual effectiveness: Can visuals be crafted effectively?

III. Personalization: Are visuals tailored to the audience?

Data Visualization Maturity Model

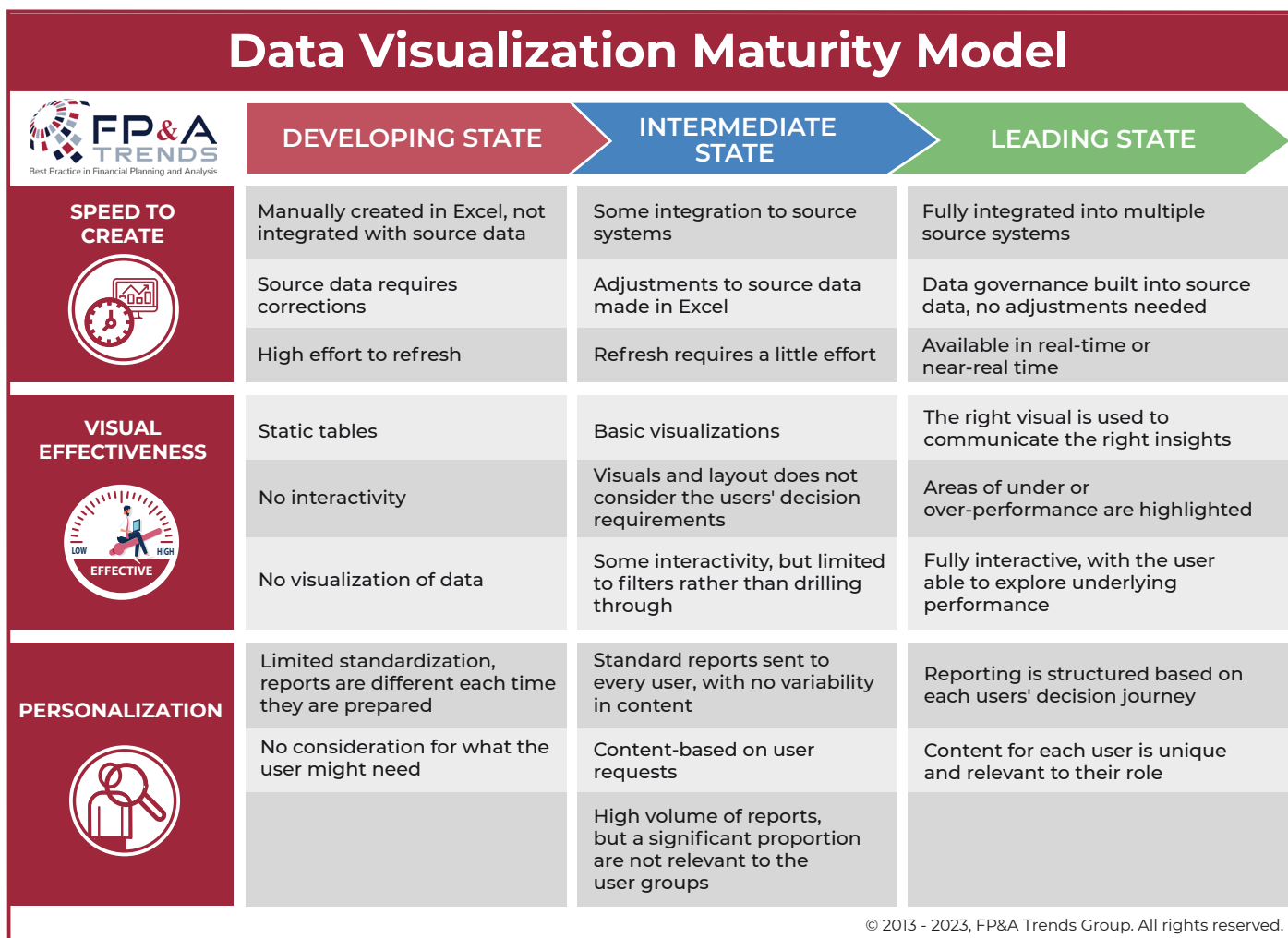|	DEVELOPING STATE	INTERMEDIATE STATE	LEADING STATE
SPEED TO CREATE	Manually created in Excel, not integrated with source data	Some integration to source systems	Fully integrated into multiple source systems
	Source data requires corrections	Adjustments to source data made in Excel	Data governance built into source data, no adjustments needed
	High effort to refresh	Refresh requires a little effort	Available in real-time or near-real time
VISUAL EFFECTIVENESS	Static tables	Basic visualizations	The right visual is used to communicate the right insights
	No interactivity	Visuals and layout does not consider the users' decision requirements	Areas of under or over-performance are highlighted
	No visualization of data	Some interactivity, but limited to filters rather than drilling through	Fully interactive, with the user able to explore underlying performance
PERSONALIZATION	Limited standardization, reports are different each time they are prepared	Standard reports sent to every user, with no variability in content	Reporting is structured based on each users' decision journey
	No consideration for what the user might need	Content-based on user requests	Content for each user is unique and relevant to their role
		High volume of reports, but a significant proportion are not relevant to the user groups	

Figure 8. FP&A Trends Data Visualization Maturity Model

Many organizations that consider themselves competent will have achieved the leading state in the first two dimensions, speed, and effectiveness. However, only a handful of organizations will have achieved the leading level in personalization. This is the differentiator between good and great. Reporting that shows only the information that is relevant to the user and recommends actions specifically for them is far more likely to inspire action. The challenge is to deliver this type of reporting at speed and scale. There are several organizations that have achieved this. A global consumer goods company provides personalized **decision cockpits** for around 50,000 users. They are then able to drill into real-time data. This provides the ammunition for the FP&A storytellers to drive rapid decisions in a volatile market.

As we have seen with Hans Rosling, technology is not needed, however, technology can make life easier.

The vast majority of management packs we see are in PowerPoint, with badly created static Excel charts copied in. Often the proportions get distorted during the process. Font sizes are inconsistent. Objects are not aligned, and there is no development from the preceding slides.

It is an eyesore. The audience must concentrate on receiving the key message. The delivery itself distracts from the story you are trying to tell.

Cash analysis - the closing **bank** balance was £xxx, after a net cash outflow of £xx in March

March collections were lower than expected vs STCF, driven by a forecasting error, and favorable vs rolling forecast, driven by strong short-term recovery.

£ms	Actuals	Forecast	Variance	Budget	Variance
Receipts	**19.8**	**20.1**	**0.3**	**22.7**	**2.9**
Total Operating Outgoings	**21.8**	**21.6**	**0.2**	**19.6**	**2.2**
Payroll	11.3	10.9	0.4	10.0	1.3
Marketing	3.1	4.0	0.9	3.0	0.1
Facilities	2.7	2.5	0.2	2.5	0.2
Technology	1.9	1.5	0.4	1.5	0.4
HR	0.5	0.4	0.1	0.4	0.1
VAT	1.6	1.9	0.3	2.0	0.4
Other	0.7	0.4	0.3	0.2	0.5
Net cash flow	**2.0**	**1.5**	**0.5**	**3.1**	**5.1**

Cash in:
- £xk (16.3%) favorable to STCF. Driven by favorable recovery on bills sent in March (£xk), bills sent pre 1 March (£xk), and other non-client receipts (£xk).
- £xk (17.6%) favorable to rolling forecast. We were favorable on short-term recovery (£xk) and non-client receipts (£xk), but offset by adverse long-term recovery (£xk) and printing and Interest (Ex).

Cash out:
- £xk (7.9%) adverse to STCF, driven by a timing adversity having to pay 2 months of Marketing costs in one month to avoid exceeding our credit limit (£xk) and 2 months of our insurance loan (£xk), un-forecast legal costs (£xk), and high website costs (£xk). This was offset by a timing favorability for the payment of other payments (£xk), and smaller favorable variances due to timing with HR invoices (£xk).
- £xk (10.5%) adverse to rolling forecast, driven by the same Marketing adversity (£xk), Insurance payment (£xk), legal costs (£xk) and high website costs (£xk) described above, adverse payrol costs (£xk). This was offset by a timing favorability for the payment of VMC/SpinOut payments (1k), and smaller favorable variances due to timing with Tech invoices (£xk), and there were £xk of smaller favorable variances making up the remaining difference.

Figure 9. Ugly PowerPoint example

Formatting rules are beyond the scope of this white paper. However, we have provided a couple of tips below:

- Headings and/or subheadings need to contain the key message, recommendation, or call to action.
- Consistent font types, sizes, and other formatting elements (such as line width) need to be used throughout the document.
- Any color scheme needs to be applied consistently, and, if possible, a corporate palette should be applied.
- Clutter should be reduced in visuals by deleting borders, backgrounds, gradients, gridlines, and other non-data pixels, a term coined by Stephen Few.
- Sources should be named at the end of the document.
- Avoid overcrowding by maintaining sufficient white space between visuals and keeping margins wide. Ensure all boxes are aligned.

Professional and clean-looking presentations, that have a wow factor, can be created with PowerPoint automation tools. Clutter-free and consistent visualizations reduce distraction and lead to faster information digestion by the audience. These skills also speed up the material creation process, allowing for collaboration with multiple colleagues, and more time to build the story.

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The following are examples of presentation formats that can be created using PowerPoint automation applications.
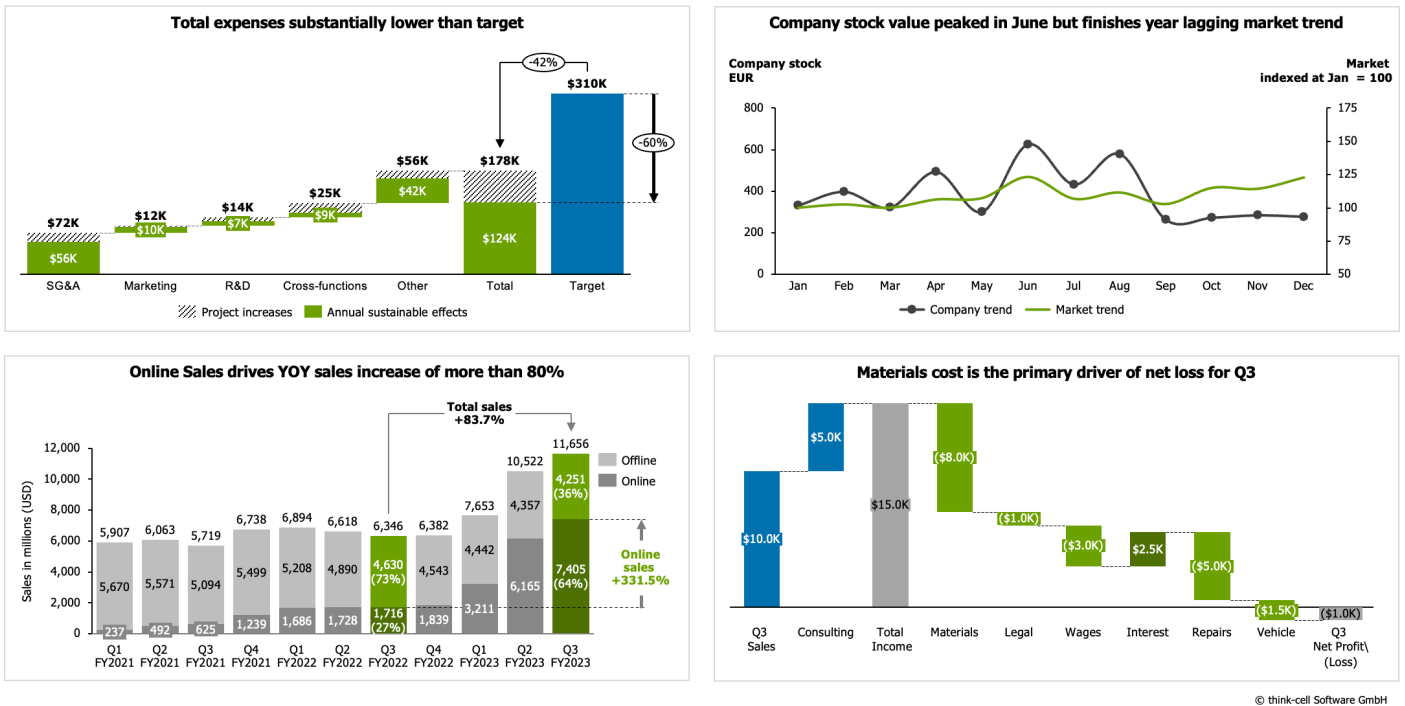

Figure 10. Example of common FP&A slides created using a PowerPoint plugin, which automates and accelerates the process of creating some of the most common financial charts and annotations.

Dashboarding technologies have become more prevalent and allow for fast information access.

Over the last ten years, dashboard and visualization applications have become much more accessible to the average analyst and no longer require coding knowledge to use and operate. FP&A teams are now more empowered as they can retrieve greater volumes of data at a faster rate. They can create different views with ease, since there are a large number of in-built visualizations within the tools that give professional-looking results. Furthermore, many applications already have **natural language search** capabilities built in. These enable the user to ask questions about the data in plain English. For example, you can type 'show me this week's sales volumes by product and region', thus avoiding the need to create and navigate a prebuilt dashboard with this particular view of data.

Dashboards only alert businesses to specific changes.

Dashboards are unable to explain why something is happening, they can only show us that something is happening. This is, therefore, only the starting point of the story, not the full story itself. This needs to be taken and developed by firstly presenting the business event in a manner that guides the audience to a conclusion but secondly by providing insights and recommendations.

The final mile of your communication is a combination of a view of data from your dashboard, overlayed with your story within, e.g., PowerPoint.

5a. Role of emerging technologies in FP&A storytelling.

The emergence of ChatGPT has reduced the cynicism about AI technology potential. ChatGPT has opened the general public's eyes to what is possible, and many are now questioning whether their roles will become redundant. As with previous technology cycles, a significant proportion of today's job roles will not exist in the future. As FP&A professionals, we must adapt to the emerging landscape and keep building our skill set. The FP&A Trends group believes that future roles will require a combination of human and machine intelligence.

As FP&A storytellers, we, therefore, need to learn how to use these emerging technologies. It is hard to predict what shape and form these will take, but some, non-exhaustive, examples include.

i.   Use AI to generate initial content and recommendations. The FP&A storyteller can then selectively use these insights to craft the story before presenting it to the audience.

ii.   Use AI to generate instant customized visuals to support the story. In reference to the data visualization maturity matrix, this will help your organization go from the bottom right quadrant, **Infographics Artists**, to the top right quadrant, **Visualizers @ Scale**.

iii.   Use AI to create the data curation scripts for use within FP&A applications, for example, planning and reporting software. Then combine this with machine learning (ML) for trend extrapolations and scenario modeling.

6 Conclusions and recommendations

Storytelling is a critical skill for modern FP&A teams and will be a key differentiator for finance staff in the future. These skills enable FP&A teams to guide their audiences to common conclusions, reduce distractions from the core message, and incite action.

Storytelling is part-art and part-science. Practice is required to fine-tune both aspects. However, the guidelines presented in this white paper will help you take a significant leap forward.

i. **AUDIENCE:** Research who they are, what they want, and how they communicate.

ii. **STORY STRUCTURE:** Structure your story elements in a way that is MECE, logical, and easy for the audience to follow without oversimplification.

iii. **CREDIBILITY:** Add credibility by providing irrefutable facts and evidence.

iv. **BRING PASSION:** Passion is the last ingredient that will make your story memorable long after you have told it.

There are some additional activities that can help improve your data storytelling skills.

- **VALUE DRIVERS:** Develop your knowledge of value drivers in your organization, as well as the critical decisions that need to be made. Your data story will need to inform these decisions.

- **VISUALS:** Develop your skills in data presentation so that your audience is able to interpret and reach the same conclusions as you.

- **LEARN FROM OTHERS:** Every organization will have a few exceptional storytellers. Watch what they do. Note how they engage different audiences. Try to emulate their approach and technique. Indeed, look beyond your organization, and study the approach of people like Hans Rosling.

- **PRACTICE, PRACTICE, and PRACTICE:** The more you practice, the better you will become. Look for opportunities to present stories and actively solicit feedback.

7 Acknowledgements

About the author

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Tanbir is an experienced finance and analytics transformation leader with a track record of delivering significant performance improvements. He has held finance leadership roles at several global organizations and has also worked as a management consultant for multiple leading consultancies. Having worked with more than 30 finance teams and developed a deep understanding of the issues they face, he is passionate about the FP&A community leaving Excel behind and embracing the digital age through improved knowledge of core data analytics. His expertise includes deploying finance and analytical systems while building a strong data culture that maximizes its benefits.

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