

FP&A Attributes

Partnership

Uncertainty

Detail

Accuracy

Curiosity

Influential

Rigor

Strategic

Integrator

Visionary

Trust

Storyteller

Flexible

Advisor

Insightful

Change maker

Resourceful

Adaptive

Impactful

FP&A Team Building: Group 1

Situational Analysis (Geography, Product line, etc.)

Key skills required (size)

Clear Job definition

Evaluation (interview process)

Diverse backgrounds (industry, views)

Shareholder communication

Exposure to each other (team): Data, Analytics, Storyteller

Show and tell (learn and celebrate)

Frequent goal setting (check ins)

Recruitment (finding talent)

FP&A Team Building: Group 2

Vision and charter: how will x add value?

- 1) Define processes and charter (not bound by current state)
- 2) Understand lay of the land (not bound by current state)
- 3) Gap analysis (skills \neq process)
- 4) Buy in from executive team
- 5) Ingraining my team in the overall business (culture)
- 6) Promote the team
- 7) Development (skills) progress
- 8) Hire
- 9) Execute!

FP&A Team Building: Group 3

Onboarding process

Ongoing process / check ins

Mentor support

Development plan

Partner / advocate

Teambuilding

Safety-fail environment

Celebrate success

Environment collaborative

Flexibility + perks

Scope team

Game plan

People / processes / systems

Assess talent of the team (gaps)

Asses self

Business partner needs

Organization specific needs

Culture

Personality testing

Defining success

Understand thought process

Personality fit

Partner with HR / recruiting