



ASSOCIATION FOR  
FINANCIAL  
PROFESSIONALS

AFP® FP&A GUIDE:

# Get Your Talent Right

Underwritten by





## OVERVIEW

To be a value-driven finance organization that partners with the business, you must know the goals and objectives of your organization. To meet these goals, you may need to bring in new talent or upskill the talent you already have.

This guide presents five studies to help you navigate the talent pipeline, from finding the right company-candidate fit to navigating a career. It is designed for two audiences: individuals considering ways to advance their careers, and managers and leaders seeking to develop their teams.

AFP works for the benefit of the corporate finance practitioner, and we hope these case studies will provide you with ideas and inspiration that you can apply to your own talent journey. AFP would like to thank the speakers, moderators and members of the FP&A Advisory Council who contributed their experience, expertise and editing to this guide.

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My sincere thanks to the AFP community for all they are doing to ensure finance professionals receive the best support as they advance in their careers - like this Guide to Get Your Talent Right.

I get asked a lot about how I would define the CFO of the future. A good CFO today understands the past, anticipates the future, and has the foresight to plan for the unexpected. I don't think that will change. And when I think about the future, I can tell you that some of the people you hire today will become a CFO in the years ahead. What they learn from you and your team will have an important impact on how well they do their job.

So, let's start with what makes for a good finance person. I think it is important that they have access across the business - what I call "bearing witness" to the organization overall. They should sit in on sales deals, technology development meetings or marketing planning. It gives them perspective so later, when they are looking at data to make financial decisions, that data has context.

I can also tell you that mentorship is invaluable. I have had incredible mentors in my career - including our CEO at AARP, Jo Ann Jenkins - and when you think about hiring financial professionals, absolutely think about how they will be mentored in a way that is consistent and thoughtful.

On behalf of our team at AARP, we hope you enjoy this Guide to Get Your Talent Right.

Warmly,

Scott Frisch

EVP, COO and CFO, AARP

## INTRODUCTION

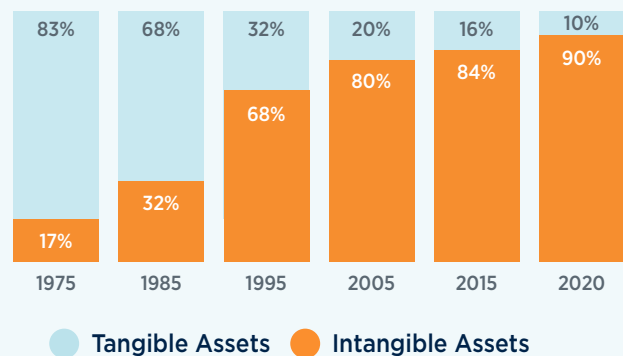
# GETTING YOUR TALENT RIGHT MATTERS FOR FP&A

*Bryan Lapidus, FPAC, Director of FP&A Practice, AFP*

In 1975, 83% of the market value of S&P 500 companies was composed of tangible assets such as PPE (property, plant and equipment), inventory, cash, land or stuff you could touch. By 2020, that was down to 10%.<sup>1,2</sup>

The intangibles include goodwill, brand equity, licensing, customer lists, R&D, and intellectual capital assets such as patents, trademarks, copyrights, preference rights and data capabilities. They also include the value of human capital.

### COMPONENTS OF S&P 500 MARKET VALUE



<sup>1</sup>Ocean Tomo. Intangible Asset Market Value Study.

<sup>2</sup>Per the Ocean Tomo study, European and Asian markets are following the same trajectory of decreasing share of tangible assets comprising their market values, although the actual percentages are higher, 25% and 50%, respectively.



## Human Capital Increases Company Value

*Strategic Finance Magazine* looked at the chart above and made the connection between valuation and people: “Managers make investments that create intangibles or enhance their value, and often those actions are key to the companies’ strategies.” In addition to the aforementioned intangibles, they emphasized the need to “identify, hire, and nurture a workforce that can deliver on the company’s value proposition.”<sup>3</sup> Experts in corporate valuation have also noted this change:

Over time there’s been a ton more emphasis being placed on the qualitative aspects of valuations for M&A activities [in addition to discounted cash flows]. What kind of management team are you going to be getting with this? What does it mean in terms of the capabilities this target will bring on to us?<sup>4</sup>

## Talent Matters in a Digital World

The opportunity for companies in a digital economy is to increase employee access to data assets and have them use the data assets well — within the

boundaries of appropriate controls and access restrictions. For FP&A, this means providing better data management and applications to increase utility. It also means getting people with the skills and aptitude to maximize those data tools and add on their human expertise.

People do not appear as a tangible asset on the balance sheet, but they drive a company’s valuation, direction, growth and longevity, as Andreas Ohl explained in *Strategic Finance Magazine*:

Human capital is particularly important in knowledge-intensive businesses because employee knowledge and skill drive the production of services, products, and new projects... But this investment isn’t typically transparent in the financial statements. The idea that human capital is an asset, and that value can be created by investing in it, stands in contrast to the historical perspective of labor as a cost that needs to be tightly managed to create value.<sup>5</sup>

The opportunity to get your talent right holds great rewards for companies in general, FP&A in particular and everyone in terms of individual career progression.

<sup>3</sup> Strategic Finance Magazine, Intangibles as ESG Opportunities by Andreas Ohl, May 1, 2022.

<sup>4</sup> AFP 2022, “How Corporate Finance Decisions Are Really Made,” Steve Higgins, Managing Director, Delancey Street Partners.

<sup>5</sup> Strategic Finance Magazine, Intangibles as ESG Opportunities by Andreas Ohl, May 1, 2022.

# STUDY 1

# BE PRIMED FOR A COMPETITIVE JOB MARKETPLACE

*Eugenia Ng, Director of Finance and Accounting, The PageGroup, and  
Caroline Neo, Senior Consultant, Finance and Accounting, The PageGroup*

The Michael Page Talent Trends report provides insights and sentiments across a dozen job markets. Through this research and staff observations, we often see a disconnect between what companies think is most important to FP&A candidates and what is actually most important.

Most **employers** define “the best” people as those who possess the entire bulleted list of skills, placing a lot of emphasis on technological advancements such as automation improvements, specific systems or solutions to internal challenges.



**Candidates** at all levels are looking for a workplace, not a task list. They value purpose, collaboration, business impact, developmental opportunities and current platforms to do the work. They want the flexibility to integrate work with their personal lives.



Our research identified top challenges for hiring and placing top FP&A talent. Below are ways employers and candidates can address these challenges.

TOP CHALLENGES	EMPLOYER PERSPECTIVES	CANDIDATE PERSPECTIVES
<p><b>Competition for the best applicants and companies.</b></p> <p>The demand for talent is far outstripping supply.</p>	<ul style="list-style-type: none"> <li>– Job descriptions should target the role. Avoid a generic list of requirements that lead applicants to scroll past you.</li> <li>– Candidates see your hiring process as an indication of how your organization runs. Ensure the interview process includes clear communication on the process, a proper job description and coordination among interviewers to avoid repetition.</li> </ul>	<ul style="list-style-type: none"> <li>– Global hiring means global competition. Highlight your achievements versus day-to-day responsibilities; quantify what you have made, saved or achieved for the company.</li> <li>– Be consistent across your resume/CV, online profile and what you say during interviews.</li> <li>– Demonstrate a growth mindset with continued credentialing and education.</li> </ul>
<p><b>Matching expectations.</b></p> <p>Recognize both intrinsic and extrinsic motivators.</p>	<ul style="list-style-type: none"> <li>– Compensation will always matter. Companies should have a strategy, such as a goal of paying in the top quartile or on par with regional averages.</li> <li>– Clarify other benefits that distinguish the employer, such as work-life balance or flexible work arrangements, personal growth and development, employee care and culture.</li> </ul>	<ul style="list-style-type: none"> <li>– Have realistic salary expectations and assess the entire compensation package.</li> <li>– Know yourself; be clear about your soft motivators and preferences, such as hybrid or flexible work models, company culture and manager work style.</li> <li>– Scope the runway for long-term career progression via skill attainment, managing teams and future roles.</li> </ul>
<p><b>Required skills unavailable.</b></p> <p>Personal growth is a partnership between the company and the employee.</p>	<ul style="list-style-type: none"> <li>– Hire the whole person. If you can't find the perfect applicant, consider which skills are transferable and how you can train people into the role (which may also help you retain people longer).</li> <li>– Companies should explain their policy for providing time and money for training, as well as access to cutting-edge initiatives, specialized education or development tracks.</li> </ul>	<ul style="list-style-type: none"> <li>– Continue to upskill yourself and remain relevant in key areas.</li> <li>– Inquire about the budget for individual learning, whether education is expected on corporate time or personal time, what certifications are valued, and whether staff is actually taking advantage of the opportunities.</li> </ul>
<p><b>Lack of applicants or roles.</b></p> <p>Always look your best.</p>	<ul style="list-style-type: none"> <li>– Are you turning off applicants without realizing it? Top candidates want to join top teams, so ensure your online presence looks polished and includes achievements and meaningful engagements.</li> </ul>	<ul style="list-style-type: none"> <li>– A 'passive search' helps opportunities find you, and you'll be the first to know of open vacancies in the market.</li> <li>– Network internally and externally, sign up with job portals for new openings, stay connected with recruiters and follow companies you'd be interested in joining.</li> </ul>



## Ace the Interview

Effective interviews have evolved into two-way sharing conversations where candidates and hiring managers are encouraged to share what they're looking for and what they can deliver, and create the right match.

### Employer Perspective:

Hiring managers should ask constructive questions, not grilling ones designed to determine who is “tough enough” to weather a difficult boss. Bringing business partners in the interview process provides a fuller picture of the work, interactions and relationships, which enables them to better evaluate the opportunity.



### Candidate Perspective:

Share your experience using the STAR (situation, task, action, result) approach to structure and professionally share your experience. Start with the situation to set the background and scene. Explain your highlights, the action you took and the rationale for making decisions, as well as the short- and long-term impact on the organization. It is especially valuable if you have designed a process or implemented a system that led to lasting change.



## After Hiring, Remember to Onboard Successfully

After the effort of finding the right employer/candidate match, capitalize on the effort by bringing them into the team quickly and effectively. Research from the Brandon Hall Group found that “organizations with a strong onboarding process improve new hire retention by 82% and productivity by over 70%.”<sup>6</sup>

Ways to ramp up engagement quickly for new hires include the creation of a ‘buddy system,’ specific educational activities, information sessions, networking sessions (breakfasts, lunch, coffee) with other new hires, presentations from company leaders and HR-assisted feedback sessions.

<sup>6</sup> The True Cost of a Bad Hire, Brandon Hall Group, Madeline Laurano, August 2015.



## STUDY 2

# PEOPLE + TECHNOLOGY SKILLS EMBEDDED IN YOUR FINANCE TEAM

*Arjun Jolly, General Manager, Reporting & Analysis, Shell Downstream & Trading, and  
Sai Giridhar, Finance Director, Shell Energy India*

In a siloed world, you had data and technology people in one group and finance people elsewhere. Shell specifically chose to blend these two skill sets within finance in the way that red and blue blend to become purple. The concept of “purple people” includes a three-step plan: Set a vision of digital leadership, be specific about how to approach it and build a people strategy around those outcomes.



## Drivers of Change

Our team is one part of a large finance organization, which itself is part of a global energy company with more than 80 thousand employees and more than \$250 billion in revenue. To integrate with the whole company, keep pace with changes to our business model, and help manage volatility, we needed to leverage technology to deliver better business outcomes.

In general, stakeholders are increasingly data-hungry and seek real-time data. For us, this means:

- The value of data will continue to increase for the business to make the right choices and for the finance analyst to deal with complexity.
- Process “consumers” increasingly expect a commercial-like experience: convenience, transparency and flawless execution.
- Scope and accountability of finance and data operations are increasing.
- Business models are changing rapidly as a result of digitalization and energy transition, creating new operational demands.

## Vision

We set a vision to establish a world-class finance team, with digital leadership at its heart. For our team in Finance and Data Operations, that meant touchless reporting, connected planning across the enterprise and predictive forecasting based on increased automation.

Our goal was to supplement the baseline functional skills with technical skills to accelerate the final delivery of a data or information product. World-class finance does not mean deep coding skills; instead, it means a finance team that is relevant in a changing world, has more time for insights through enhanced quality of work, and develops a win-win proposition for professional development for individuals and the organization.

## Enabling Technologies

There are four key pieces of technology that we see playing a role in delivering on the vision and these capabilities:

- **First-time-right data:** tools and processes to establish data management across a span of systems.
- **Continuous accounting:** a daily close to understand company position.
- **Predictive forecasting:** automated forecasting with humans-in-the-loop.
- **AI-driven insights:** automated preparation of base analysis.

## People Skills

We have identified the non-financial, traditional skills of an FP&A analyst and leader and found they are more behavioral than technical and primed for a digital workplace. Notice two items: shrinking the human middleware and anticipating change. We want our finance team to proactively look for opportunities to do their work better.

FP&A ANALYST	FP&A LEADER
<ul style="list-style-type: none"> <li>– Adapting to change</li> <li>– Commercial curiosity</li> <li>– Storytelling</li> <li>– Execution-focused</li> <li>– Performance insights</li> <li>– Shrinking the human middleware</li> </ul>	<ul style="list-style-type: none"> <li>– Anticipating change</li> <li>– Critical thinker</li> <li>– Looks external-inward</li> <li>– Propensity for action</li> <li>– Strong communicator</li> <li>– Business-centric</li> <li>– Effective collaborator</li> </ul>

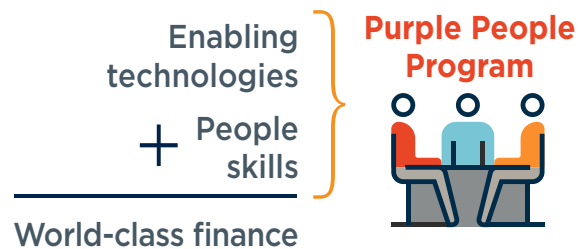
Our people strategy should not establish a shadow IT function or data science team; rather, it should apply technology that can streamline processes, connect the dots and ensure data harmonization. This strategy gave rise to our **Purple People Program**, which has a stated goal of developing our people with technology skills so that they can solve business problems:

- **Participation:** 20-25% of the teams go through our program. The limited number allows for nimble delivery, a natural sorting of leading-edge technologists and iteration on the program for continual improvement.

- **Education and certification:** Purple people study various courses, and we celebrate their completion of a curriculum. It is a combination of the pull from the individuals who extend themselves and the push from the organization.
- **Hackathons:** We write up real business challenges and bring people in from different areas to solve the cases. These hackathons spur interest in the deeper application of available tools and highlight ways to apply tools used for one challenge to another. They also create social networks among leading-edge technologists in finance.
- **Access for all:** Those not in the program also have access to online learning programs. And those in the Purple People Program share their expertise and combine finance and technology through informal, on-the-job interactions.

The Purple People become a **critical mass of experts** in the ecosystem. These people can be thought of as mentors or as an enthusiastic community of individuals who share ideas and learnings.

## People Strategy



# STUDY 3

# GET SAVVY ABOUT BUSINESS AND OPERATIONS

*Asif Masani, FP&A Manager, Coursera*

When I started in FP&A about ten years ago, I focused on financial statements, reconciliations, internal controls and management reporting. Now, my business partners expect more insights to help them make meaningful decisions. This is a framework to help your FP&A team develop the right skills to drive business results by examining three areas.



## Understanding the Business So You Know How to Add Value

If you want to create value for the business and develop credibility, you have to understand the business itself. Often, business folks tell me that, although finance is reporting the numbers, they don't think finance understands the numbers or what happens behind the scenes to get those numbers. A helpful tool to build literacy is the business model canvas, which deconstructs a business into nine sections.



## Business Model Canvas

<p><b>KEY PARTNERS</b></p> <p>Who are the key partners and suppliers that are essential for our business model to succeed?</p> <p>List the resources or activities they perform.</p> 	<p><b>KEY ACTIVITIES</b></p> <p>What do we do every day to run our business model?</p> 	<p><b>VALUE PROPOSITION</b></p> <p>Why is our business in existence? What value do we bring to our customers?</p> <p>How are we different from our competition?</p> <p>What are our products and services?</p> 	<p><b>CUSTOMER RELATIONSHIPS</b></p> <p>How do we as an organization position ourselves in front of and interact with the customers?</p> <p>How do we maintain the relationship?</p> 	<p><b>CUSTOMER SEGMENTS</b></p> <p>For whom are we creating value?</p> <p>What segments are we pursuing?</p> <p>List the segments that provide the most revenue.</p> 
<p><b>COST STRUCTURE</b></p> <p>List the top costs by looking at activities and resources.</p> 		<p><b>REVENUE STREAMS</b></p> <p>List the top three revenue streams. If the business does anything for free, add those things here too.</p> 		

To help you complete this template and build your business literacy, you might consider ways to extend yourself:

- **Beyond your silo:** Join or create cross-functional projects or shadow people as they work, schedule “brown bag lunches,” and organize trainings with subject matter experts from various departments, products and functions to share their insights.
- **Beyond your desk:** Conduct occasional market and field visits.
- **Beyond your company:** Attend business and external meetings and industry conferences.

## Generating and Communicating Insights

Whenever we are doing any analysis or doing any reporting, data is the starting point that can answer the “what” question. Then you move up to the next level of inspection, creating information. **The “5 Whys” technique can help you move beyond the surface level “why” to the root cause “why.”**



## The 5 Whys

1.	<b>Why</b> are my total revenues lower than expected?	My data shows me the shortfall is in XYZ department; technically, I have the answer, but I have not gained insight.
2.	<b>Why</b> are the revenues in XYZ department lower than plan?	My contact in XYZ tells me, “We offered big discounts in one of our product categories, which was not planned.”
3.	<b>Why</b> did we offer discounts so much higher than expected?	My contact says, “The promotion was part of a price differentiation strategy.”
4.	<b>Why</b> did you run that promotion for those products?	Now the sales manager says, “We had to do that to clear those old, slow-moving products.”
5.	<b>Why</b> did you do that?	You learn that demand for these products was below expectations.

*This is an insight you can apply to future product investment decisions.*



## Building Relationships on a Foundation of Trust

FP&A is in a unique position to talk to partners, departments and stakeholders across the company. To use a sports analogy, we have the opportunity to be a coach on the field, guiding the business to make meaningful financial and business decisions rather than watching from a distance and keeping score.

Here are some ideas:

- **Frequent business interactions.** A transactional connection is approaching the business when I needed to collect numbers or information; instead, we should build a mutual, relational connection through regular contact.
- **Look for the negative space.** Reports include what was achieved relative to the plan; we can evaluate the path or decision not taken, in a constructive way that shows we are a learning organization.
- **Go beyond titles.** Anybody can be a finance business partner, whether you sit in FP&A, accounting or controllership. It is both a mindset and a job title!

Getting to this level takes time for you to develop the capabilities, routines, mindset and staff, as well as the expectation among your partners that this is what FP&A delivers. If you are just starting out or are new to FP&A, it might seem overwhelming to consider how to begin. I recommend building out your capabilities step by step. Start by understanding the business, then move on to generating insights, then move on to communicating those insights. While working on those things, ask questions and be a constant presence; this will build your relationships with business partners.





## STUDY 4

# MANAGE YOUR TEAM WITH SITUATIONAL AWARENESS

*Craig Stevens, Former Senior Vice President and Head of Reporting US Life & Health, Swiss Re*

My team at Swiss Re North America had an opportunity to really rethink how our team delivered financial services. We had completed a painful downsizing and now had the opportunity to rebuild and think about how we wanted to empower individuals to be agile and keep pace with a changing business environment.

For inspiration, we considered the redesigned remote control for the Apple TV product. Apple could have simply added more buttons for more functionality, but instead they asked, what are the fundamental things that remotes need to have?

Whenever you're thinking about change, try to step find unique ways to do things. Here is how we approached building and managing our team.



## Hire for Behaviors

To borrow an analogy from Jim Collins' book *Good to Great*, as you're building your team, think about whom you want on the bus, then determine where the bus is headed. Successful teams require a good mix of skills and talents, and more importantly, the right behaviors that ensure continued adaptability in a changing environment.

We identified the behaviors we wanted, then stamped them on everything we did. We wrote them into job descriptions, and we emphasized them in the hiring process. In some interviews, we did not even talk about the candidates' technical expertise because the resume spoke for itself. Instead, we focused on key behavioral traits:

- **Strong collaborator:** Work across the team and cross-functionally.
- **Effective communicator:** Make your message clear, strong and understandable to people at different levels.
- **Comfortable with being uncomfortable:** Deal with ambiguity in our own business and in our organization.
- **Agile mindset:** Do different things as situations and needs change.

In our interview process, we assess behaviors by asking for examples around the targeted behaviors and themes. I like to ask open-ended questions to gently push them out of a "make an impression mode" and encourage them to open up and have a discussion that simulates the flow of an actual relationship. For example: Tell us about a time when you had to work with other teams and other functions on a project. How did you deal with personnel issues? What different roles do you play on teams? What makes effective teams?

The key behavior we value is critical thinking, so we ask challenging, open-ended questions to see how they dissect a problem and approach an answer. For example: How many golf balls are there in the world? One answer could be to assume that there are 50 golf balls in every golfer's bag and 10% of the population golfs in the G-20 countries.



## Manage Teams by Type

There are different types of teams, and the style of leadership relates to the norms of the team. The table below is not meant to represent a natural progression of good, better, best. Rather, the style of leadership should match the situation, talent and maturity.

	THE EXPERT TEAM	THE ACHIEVER TEAM	THE CATALYST TEAM
Description	This manager knows what they're doing and steers the team in the direction they think is appropriate.	The manager sets the agenda and then solicits collaboration and buy-in from the team.	The team knows what they need to accomplish and members reach out to each other for advice, activity, input and ideas.
Leader	"Supervisor" type of leader. The manager is directive about what to do and when to do it.	Manager communicates goals and ideas, then solicits feedback.	Inspirational leader who promotes vision, stimulates action and acts as a facilitator to create high participation from members.
Approach	Tactical approach to problems or processes.	Strategic approach focused on outcomes.	Transformational approach to challenges.
Work	Incremental improvements inside unit boundaries.	Motivated individuals that lead to strong performance.	Culture that promotes teamwork, participation and empowerment.
Team	Activities performed as individuals rather than as a team.	Managed with a "team" view.	Proactive engagement with diverse stakeholders.

A catalyst team requires time to build up its muscles to elicit the right response, and transformational leaders often adapt their style to the maturation of the teams over time. The catalyst team is also a great way to prepare your team members for increasing responsibility and getting promoted.

## Manage Team Workloads

It is easy for a manager to assign the most challenging, important or interesting work to the high performers who will do a great job, are highly engaged and rarely say “no.” Suddenly, and often too late, certain individuals are overloaded! This challenge increases with remote or hybrid work when we can’t oversee our team as closely. To manage differently, we:

- Created a heat map of the team’s workloads and noted everyone’s “RAG status”: red means 120% of capacity, amber (yellow) is at capacity and green means they have more capacity.
- Instituted frequent pulse checks. This requires a safe environment for people to have conversations. Ask open-ended questions of each other, making sure you don’t give people an easy out with a simple yes or no. Especially when people are further from headquarters, they do not want to disappoint leadership and often say “yes” to requests that they did not really understand or don’t have the capacity to fulfill.
- Adjust goals mid-cycle. Any number of things could lead to a reprioritization. Check in with individuals on their progress, and don’t be afraid to realize that moving from point A to B is rarely a straight line.

## Build a Meaningful Purpose and Strategy

A team needs to have a route forward and purpose to guide them, a North Star to help people see the bigger picture of their everyday role. We started with Swiss Re’s corporate purpose, “to make the world more resilient,” then our finance management team crafted a statement that aligns with our services to the company: “We are the financial advisors of Swiss Re and our clients in making sustainable, rational financial decisions.”

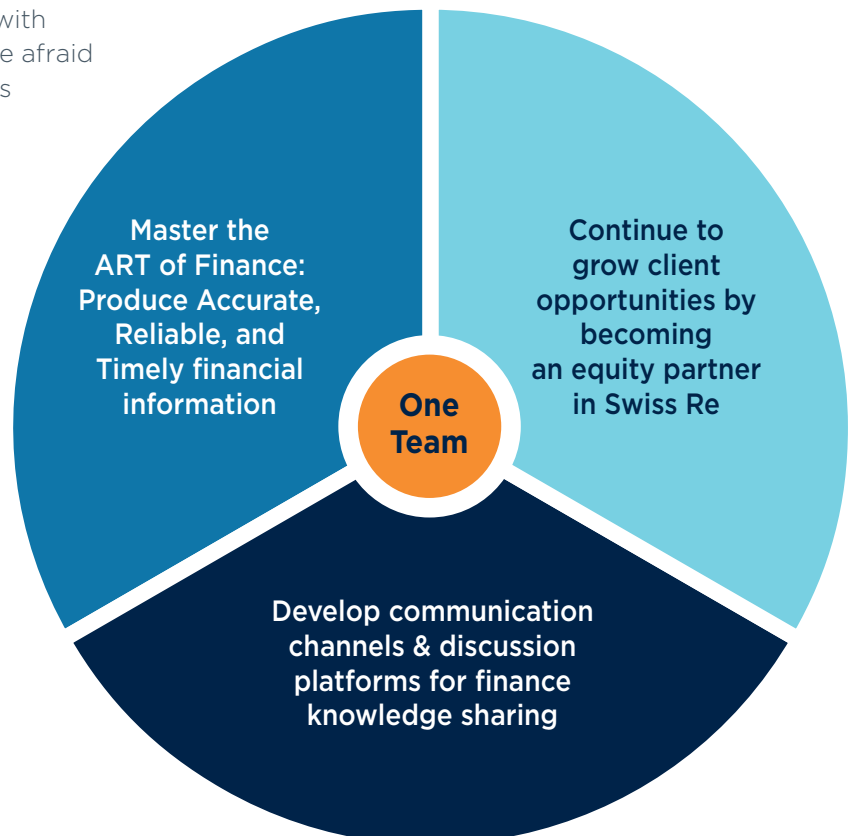
Our purpose led to our strategies and ultimately to how we organize our work and initiatives. If our work is not in alignment, we have to question whether it’s the right activity to focus on.

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### Our Purpose:

Together, we are the financial advisors of Swiss Re and Our clients in making sustainable, rational financial decisions

### Our Strategy:



## Meaningful Conversations

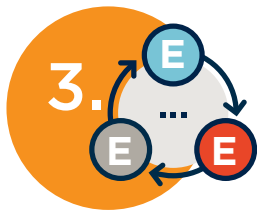
The finance learning and development leader at a major multinational corporate explained that in addition to coaching conversations that arise on the job, this company utilizes a five-conversation framework to ensure that employees and people leaders have meaningful discussions at fixed intervals throughout the year, on a semi-continuous basis, to support development:



**1. Performance and development planning:** Looking to the year ahead, the purpose is to align what the employee will do, how they will do it, and what resources they will need to be successful.



**2. Midyear check-in:** Review progress on goals and provide candid and actionable feedback to the employee.



**3. Career planning:** Talk through development and career aspirations; align on plans to address the 3 E's — exposure, experience and education — to help support development and progression.



**4. Year-end performance review:** Provide actionable and candid feedback to support the employee's development.



**5. Year-end compensation:** Based on the employee's performance, discuss the associated merit pay and bonus.



## STUDY 5

# BUILD YOUR STRENGTHS FOR A REWARDING CAREER

*Rex Gu, Asia Regional Operations CFO, Maersk*

Many in finance set a goal to become CFO, and there are many different routes to this position. You can come from a treasury, accounting or controller role, but I reckon that FP&A is a really solid springboard to rise to the top because you can make sense of the numbers, tell the story and engage the senior stakeholders.

To get to the key roles in my career, I needed to set and signal my aspiration, and also deliver on my work every day in a consistent manner. I would like to share a tool that has helped me on this journey. We call it a talent compass, a way of thinking about how to build your strengths and develop yourself and your career.

## Talent Compass

### 1) Wise Up: Self-Awareness

**Leverage awareness of strengths and weaknesses, while actively adapting to different situations.**

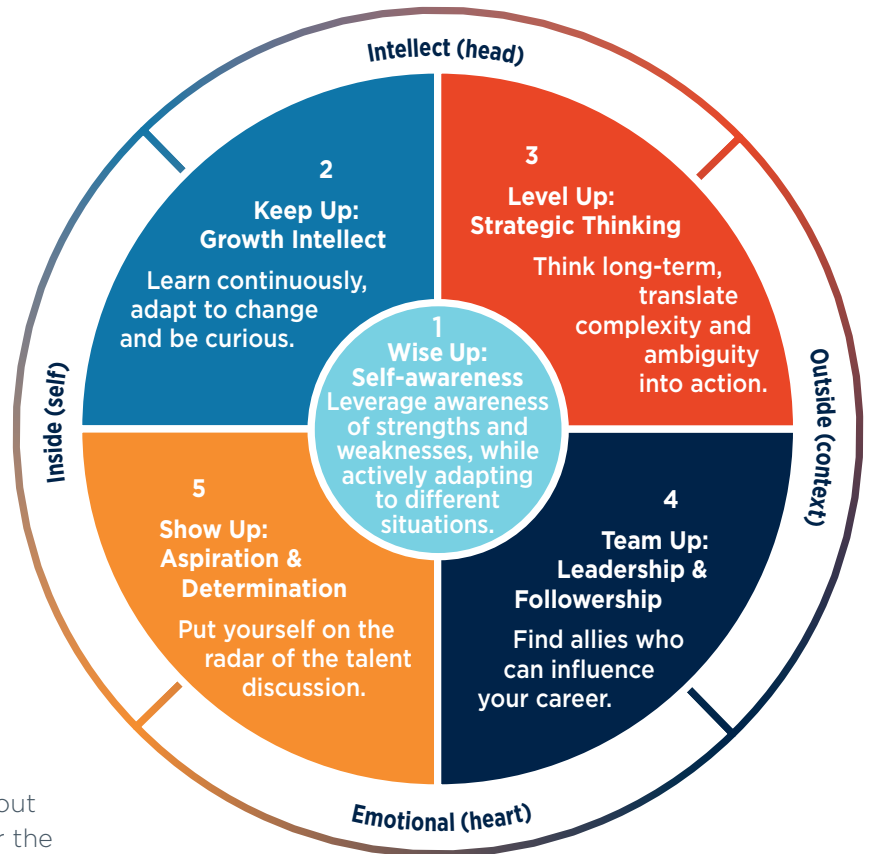
At the heart of any successful career — and also contentment with your life — is knowing who you are, what you want and what you have an aptitude for. Understand that this may change at various stages of your career.

During the first few years at my company, I explored my interests and talents at a company that afforded me these opportunities. I completed a management trainee rotation then moved to a commercial role running product management and pricing. I did a bit of soul-searching and decided to return to my true passion: improving business outcomes by diving into the numbers, the P&L and the bottom line. I also recognized something about myself: I don't want to be the number one or the chief in the limelight. I want to be the right hand to the business boss as the strategic and trusted adviser. The CFO definitely fits in the role. This realization led me to other deliberate choices, and I started signaling my aspirations by talking about them with my peers and coworkers.

### 2) Keep Up: Growth Intellect

**Learn continuously, adapt to change and be curious.**

Covering the technical basics is just the qualifier to get you in the door, but to rise in your career, you must display a growth mindset to expand your skill set, and intellectual curiosity to seek the story behind each number. Are you learning new tools? Are you pulling in information from new sources? What moves the needle for these changes? Do you consider the human emotions and psychology, the organizational behaviors, and the structural incentive that impact the behaviors and influence decisions?



### 3) Level Up: Strategic Thinking

**Think long-term and translate complexity and ambiguity into action.**

Your job is not only producing data; it is to materialize an impact on the business by navigating the sequence from data to insight to influence. To cruise at the same altitude as your business partners, understand their point of view and present your finance acumen in a way they can understand.

To do this, you need to navigate the sequence from data to insight to influence. The key to influencing is interpersonal skills, such as negotiation and communication. To speak the language of the stakeholders, FP&A must get in sync with them, be strategic in storytelling and narrative shaping. And do this in every medium of communication: emails, proposals, video calls and text chats.

#### 4) Team Up: Leadership and Followership

##### Find allies who can influence your career.

Along your professional journey, you need to find allies who can influence your career and sponsors from across the organization. The more stories there are about you being outgoing and assertive and taking leadership initiatives without being asked, the more chances that senior leadership will hear about you.

- See every email, conversation, report or interaction in your day-to-day work as an opportunity.
- Be a good, supportive teammate.
- Find role models and mentors.
- Share your ambition, so people can help you on your path.
- Seek out diverse connections and feedback beyond your current boss and team.
- Look for out-of-the-ordinary opportunities, such as special projects and cross-functional roles to expand your network.
- Consider lateral moves that can expand your skills and contacts.

When you are far from the center of authority in the company — maybe the headquarter is in another continent, or you have a front-line role — these actions become even more important. Try to build up your professional network and social capital in a way where you can stay in sync with the HQ.

#### 5) Show Up: Aspiration & Determination

##### Put yourself on the radar of the talent discussion.

Seek more responsibility and complexity, embrace challenges, while be curious and emotionally stable. Part of self-awareness is setting an aspiration for the kind of work and level of responsibility you want, having the grit to achieve your goals, and doing it without harming your teammates or personal integrity.

For me, I signaled my passion and desire to be the regional FP&A lead, and then the regional CFO. I work for a global Fortune 500 company, so that took quite a bit of maneuvering. I needed to plant my flag and signal to my boss, champions, stakeholders and mentors, while earning my credit and realizing my aspiration by delivering the day-to-day!





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