



CFO Transition Lab™

Plan ahead

The CFO's job would be much easier to manage if it were neatly defined. The reality? CFOs' roles are continuing to expand far beyond their more traditional responsibilities as chief accountants, focused on financial statements and capital structure. Valued strategic partners, they serve as leaders, actively innovating and even stepping outside of the finance function as their jobs require. As overseers of strategy, operations, and performance, the issues they confront can be both more complex—and more interconnected—than they were in the past.

Deloitte's CFO Transition Lab is specifically designed to allow newly appointed CFOs—including those with prior CFO experience—to explore how to make efficient and effective transitions to the expanding demands of the role.

Map the next six months of your journey

This Lab is a one-day session based on the CFO Program's extensive research, offering a tailored experience to help finance leaders navigate their new role. The Lab agenda focuses on three important resources CFOs should manage during times of significant change: personal and organizational time management, talent in the finance organization, and critical stakeholder relationships.

Through the Lab, CFOs can create a tangible 180-day work plan with four workstreams. Deloitte advises participants as they develop their takeaways:

- Define and communicate priorities
- Assess and develop a talent strategy
- Understand and influence specific stakeholders
- Frame concrete actions to achieve priorities

Lab inquiries: uscfortransitionlab@deloitte.com

In the Lab, a participant can explore:

- **Hopes, fears, and legacy:** Define a “north star” and consider the CEO's agenda.
- **Organizational capabilities:** Evaluate the finance organization's current versus desired strengths in key areas.
- **Priorities:** Use Deloitte's Four Faces of the CFO framework that allows CFOs to identify, re-prioritize and re-classify the urgency and importance of each.
- **Communication strategies:** Develop language to communicate strategic priorities to stakeholders.
- **Talent:** Examine capabilities and bandwidth of direct reports, as well as the scope and efficacy of reporting relationships to help build capabilities for the future.
- **Relationships:** Focus on the strengths of key relationships and refine influence strategies needed to achieve priorities.
- **180-day plan:** Create action plans with specific milestones.



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The CFO Program

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