ORACLE
NetSuite

CFO's Effectiveness Checklist

To-Do List Item #1:

Run Effective Meetings

Reach beyond the finance group to meet with other departments, helping them understand the company's financial standing and how they can factor finance into their strategy discussions and tactical decisions.

To-Do List Item #2:

Maximize Automation

Save time and money. Automate as many processes, workflows, and day-to-day admin tasks as you can with the technology that you have.

To-Do List Item #3:

Be a Mentor – With a Low Time Commitment

Raise the next generation of finance leaders within your company with quarterly calls, which can inspire your team and also help show you're ready for your own promotion. Maybe even to the CEO.

To-Do List Item #4:

Offer Your Analytical Abilities to the Rest of the Company

Help other departments in your company understand and use the analysis that your finance team can offer, especially in operations, to get everyone making decisions that benefit the bottom line.

To-Do List Item #5:

Drop a Line to the Board

Nurture your relationship with the Board. Forward interesting articles or provide monthly company updates to establish trust and collaboration.

To-Do List Item #6:

Make Time for Deep Work

Make time for the high-quality, creative output that comes from true focus on deep work. Start by blocking off an hour on your calendar each day, outside of peak meeting times and during the part of the day when you generally feel most productive.

To-Do List Item #7:

Tune in to Other Teams

Get talking to people outside of your department and at all seniority levels to understand how to better sharpen company strategy. Seek out prime times for relaxed conversations, like lunches, company events, or virtual coffee chats to learn about other groups' goals, challenges, and priorities.

To-Do List Item #8:

Get Social

Amp up your online presence. Update your LinkedIn profile, engage with and spark conversations on interesting articles, and consider writing and posting thought leadership content of your own.

To-Do List Item #9:

Scan Your Updated Reading List

Gain interesting insights by exploring newsletters, LinkedIn, or major publishers for news that's relevant to you and your team, as well as your business and industry.

To-Do List Item #10:

Keep Your Goals in Sight and Reevaluate Regularly

Assess your department's goals weekly, monthly, and annually. Analyze performance on KPIs that map to your goals, run through the actions each team member will take this week to further them, and ask how you can remove any roadblocks.