



Chief Financial Officer's Playbook

**Preparing you for
your new role**

2025

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Welcome to your new role

Congratulations on your appointment to CFO

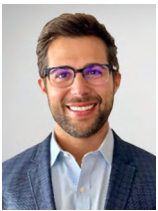
The first 100 days for a Chief Financial Officer (CFO) are crucial for setting the tone and direction of their tenure. The modern CFO role is more influential and multifaceted than ever, and the CFO has a big part to play as the leader of the finance function and as a contributor to organizational strategy. Along with the new responsibilities come tremendous opportunities and, as a new CFO, you will put your mark on the organization as you lead enterprise performance and maximize shareholder value. There are risks and challenges, too. Chief Executive Officers and boards expect more from the CFO. Technologies, AI, data, and analytics are changing constantly, and the importance of innovation is rising as markets dispense rewards and punishments these days with astonishing speed. We are seeing the next generation of finance taking shape in real-time – at a record pace.

Amid these pressures, the transition period is the time to lay the foundation for your success. You may be fortunate to have a limited honeymoon period, but people are watching, and opinions form quickly. It is important to move early, but deliberately and strategically, to make the most of your first 100 days.

By steadily building credibility and taking advantage of opportunities for early wins, you can establish a pattern of success that builds on itself. Conversely, early mistakes can damage new relationships, making it harder to win the support you need to be successful.

These resources outline some of the practical considerations facing transitioning CFOs in today's hypercompetitive environment, with an eye to establishing a healthy cycle of success from day one. Each transition has its unique elements, but several key issues affect CFOs universally. Based on our experience working with CFOs and with these topics in mind, we outline a potential 100-day plan to help maintain focus and build relationships as a foundation for success in your new role.

Thank you.



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The new reality

The Chief Financial Officer (CFO) must remain vigilant in navigating the evolving landscape of today's business environment. KPMG research finds that U.S. Chief Executive Officers (CEOs) are acutely aware of the unprecedented changes and disruptions impacting organizations, which pose significant risks to long-term sustainability. Companies across all industries are grappling with the need to enhance customer-centric strategies, adapt to shifting workforce demographics, address converging business models, respond to geopolitical shifts, and comply with an evolving regulatory framework, all while embracing emerging technologies.

In particular advancements in AI, data, analytics, and the intelligent cloud are poised to drastically transform the size, shape, and composition of the finance function. These technologies will enable more data driven decision-making, streamline operations, manage risk and compliance, evaluate and cultivate a modern workforce, and unlock new opportunities for innovation and efficiency. As a result, CEOs are increasingly relying on the finance function to assume a more expansive and strategic role than ever before.

AI is a game changer for finance

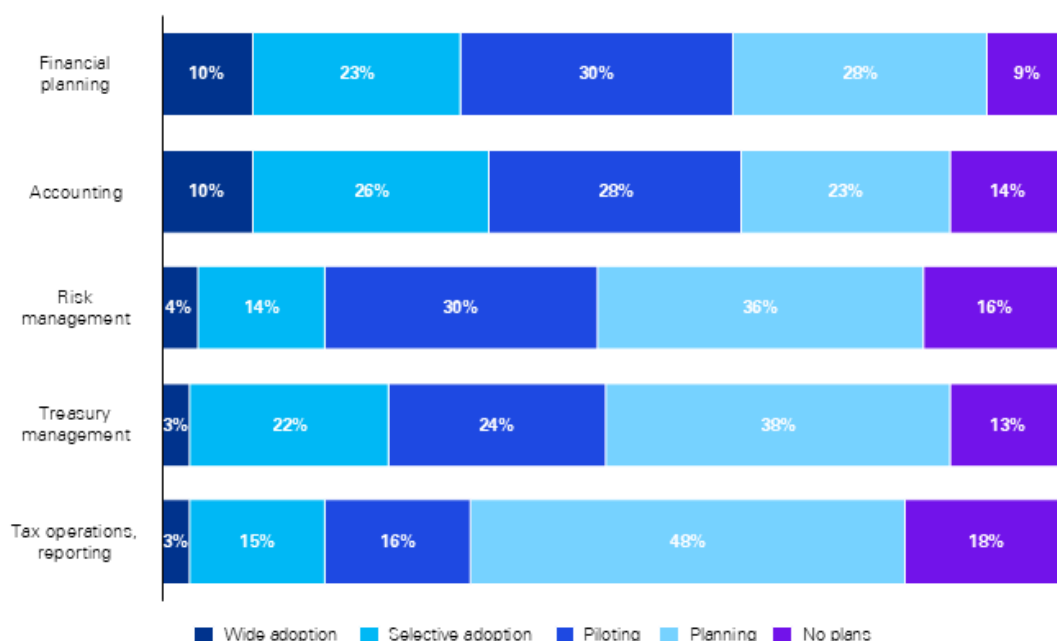
Companies are turning to AI in every area of finance – our research shows that the use of AI is rapidly expanding: 71 percent of companies are using AI in finance, 41 percent of them to a moderate or large degree.

The below chart shows percentages of AI adoption across different departments of the finance function. According to our findings, the accounting and financial planning groups are furthest ahead in using AI because of the potential benefits it brings to many of their activities, such as improved data processing and financial reporting, real-time insights, and predictive analysis. Currently, nearly two-thirds of companies are piloting or using AI for accounting and financial planning.

Other areas of finance are following suit: nearly half of companies are now piloting or using AI for treasury and risk management. This can generate better debt management, cash-flow forecasting, fraud detection, credit risk assessment, and scenario analysis in the treasury and risk management functions.

"Embracing AI in finance is not just about leveraging advanced technology; it's about cultivating a foundation of trust. By prioritizing transparency and ethical practices, organizations can harness the power of AI to enhance decision-making, optimize financial strategies, and foster a culture of accountability, ultimately driving sustainable growth and innovation."

Sebastian Stöckle
Global Head of Innovation and AI, Audit KPMG International



Source: KPMG global AI in finance report

The CFO agenda for the Future of Finance

Leaders must adopt a comprehensive approach to transform finance in the age of AI. The next generation of finance is being shaped by rapid advancements in AI and data capabilities. These emergent capabilities are central to the digital core that enables a new operating model for finance and allows organizations to leverage data as a strategic asset, and drive sustainable performance, while strategically positioning finance as the enterprise value driver.



Drive enterprise value, growth and performance

Create value and drive performance improvements through usage of AI, technologies, and talent strategies in finance.



Elevate to the intelligent cloud

Adopt a comprehensive approach to integrating AI and data into their cloud architecture to drive better user experiences and operational efficiencies.



Leverage data as a strategic asset

Utilize business ready data sets to drive efficiencies, improve profitability and better align financial strategies with business goals.



Scale intelligent finance

Scale intelligent finance by advancing towards a fully digital, intelligent finance function – from processing and closing to planning and reporting – driving greater efficiency and strategic decision-making.



Flex the delivery model

Transform the finance delivery model by harnessing data, the intelligent cloud, and AI, to enable changes in the size, structure, and composition of the finance function to enhance efficiency and agility.



Modernize the workforce

Equip finance teams with modern tools and skills to thrive in an AI-driven landscape and advance the intelligent footprint.



Trusted AI and dynamic risk management

Strong governance, rigorous controls, and building trust is more vital than ever in this emergent era. Enhance current or develop new governance processes to effectively support the enterprise-wide adoption and account for the unique risks presented by AI.

Create value and drive performance

Finance remains uniquely positioned to drive strategic growth and monetization of AI and data investments. A comprehensive approach to data drives efficiencies, improves profitability, and better aligns financial strategies with business goals to accelerate growth.



**Value potential based on extrapolations of KPMG AI & Technology surveys and cross-industry analysis on the impact of AI over the next 24 – 36 months*



The Future of Finance

How AI & Data are shaping the next generation of finance







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The 100-day plan

A Roadmap to the CFO's First 100 Days

The first 100 days in the new CFO role are critical for laying the foundation for long-term impact. This roadmap outlines the key components and priority tasks that should be addressed early on to enable a smooth, strategic, and effective transition.

Days 1-20	Days 20-40	Days 40-60	Days 60-80	Days 80-100
<div> Define & Enable Enterprise Vision & Strategy</div>			<div> Drive Your Vision</div>	
Understand the company's historical and current financial health, strategy, and vision	Align on finance enterprise vision		Socialize vision and receive sign-off	Finalize roadmap
<div> Empower Your A-Team</div>				
Identify key stakeholders, conduct introductions and establish cadence	Conduct meetings with key stakeholders to understand current strategies, business challenges and areas of opportunity	Socialize and evaluate opportunities identified, your perspective on future state vision and role of Finance		
<div> Manage Compliance & Risk Obligations</div>				
Understand your financial, compliance, and control obligations	Assess opportunities and deficiencies in controls, risk management, tax, and regulatory compliance and evaluate governance			
<div> Assess Your Function</div>				
Understand current cost of finance, operating model, talent strategies, and levels of process standardization and benchmark against industry peers			Evaluate opportunities to evolve finance operating model through AI and automation	
<div> Understand Data to Drive Insights</div>				
Assess enterprise data management strategy and alignment to business operating model		Gather and determine data accuracy, availability, and efficacy	Analyze profitability and assess budgeting and forecasting efficiency	

Define & Enable Enterprise Vision & Strategy

As you evaluate your new role as CFO and conduct discussions with stakeholders, you will gain insights into the health and historical performance of the organization and how that has shaped the strategy, growth profile, and any gaps or inconsistencies that need to be addressed. Understanding the organization’s strategy in detail, as well as how it has been executed, will be essential in shaping your approach to financial leadership.

Two critical focus areas for the first 100 days agenda are understanding finance’s impact on the organization’s strategy and the degree of alignment between the overarching strategy and the finance function’s goals. This alignment is paramount, as finance must be positioned not only as a functional support but as a strategic partner in driving business outcomes.

For many organizations, there is a significant opportunity for finance to improve its integration with the broader business—especially in how it understands, enables, and delivers on the business strategy. This includes enhancing the collaboration between finance, tax, treasury, and other key functions to ensure that financial decision-making and performance management are fully aligned with the company’s strategic objectives. Strengthening this integration will not only improve financial outcomes but also support more informed, agile decision-making across the organization, driving sustainable growth and positioning the company to thrive in a rapidly changing business landscape.

By proactively addressing these focus areas, you will lay a solid foundation for the finance function to not only support but actively lead the charge in realizing the organization’s strategic vision.

Understand the company’s historical and current financial health, strategy, and vision

Activity	Objective(s)	Timing
Understand growth and financing strategies	<ul style="list-style-type: none">Understand the company’s business model and growth strategy (e.g., organic versus inorganic) during your key stakeholder meetings.Analyze financial targets and strategy to achieve the targets.Become familiar with the company’s portfolio of investments and other financing.	Days 1–20
Assess company health and historical performance	<ul style="list-style-type: none">Review current and historical state of company’s financial health (e.g., cash flow health, trends in revenue growth, profitability, liquidity, and debt levels).Conduct internal and external benchmarking to gain insights on performance and competitive positioningIdentify company specific challenges that will be faced within first year	Days 1–20



Align on Enterprise Vision

Activity	Objective(s)	Timing
Evaluate the collaboration and value finance brings to the business	<ul style="list-style-type: none"> Assess the level of collaboration, partnership, and perception between each business unit and finance. Evaluate whether business leaders consult with finance leaders prior to making decisions or inform them after decisions are made. Examine the effectiveness of the strategic planning process and identify ways to actively contribute as an integral participant 	Days 20 – 75
Address tax strategies	<ul style="list-style-type: none"> Understand total effective tax rate and plans to reduce it. Integrate tax planning with strategic planning on opportunity assessments in tax efficiency, cash flow management, and capital structure optimization. 	Day 45
Optimize treasury strategies	<ul style="list-style-type: none"> Conduct a comprehensive review of existing treasury processes, systems, and controls to understand current cash flow patterns, bank relationships, and exposure to financial risks. Assess the company's current treasury technology and identify potential upgrades. Review the company's current debt structure, including maturities, interest rates, and covenants. Ensure that treasury policies and procedures align with best practices and current business needs. 	Day 45
Understand alignment with company strategy	<ul style="list-style-type: none"> Test company incentives to ensure they drive the right behaviors and support the organization's financial and performance goals. 	Day 75



Empower your A-Team

One of the most crucial elements of a successful transition into the CFO role is building a strong, capable team and understanding the dynamics of the people around you. The relationships you cultivate with employees, senior leaders, and key stakeholders will not only provide you with invaluable insights into the organization's current challenges but also help you gauge the expectations placed upon you as the new CFO. These connections serve as a window into the organization's needs and are instrumental in identifying where you can have the greatest impact.

Identifying a list of key stakeholders and scheduling time with them should begin in the first week of your new role. While key stakeholders such as the CEO, board of directors, audit committee chair, finance team leaders, and key investors are obvious choices for inclusion, we strongly recommend that you also include business unit heads, regional leaders, functional leaders, and key customers. These interactions will offer a comprehensive view of the organization's landscape, ensuring that you have a well-rounded understanding of its needs and priorities.

Engaging in productive, candid discussions with these stakeholders is key. These conversations should aim to uncover not only the company's opportunities and challenges but also each leader's strategic direction and priorities. A critical aspect of these discussions will be assessing how well the finance function currently supports their needs and where gaps may exist. Gathering feedback on how you, as CFO, can better contribute to their success will provide you with actionable insights into how to refine and elevate the finance team's performance.

The next step is to schedule follow-up meetings where you can present your vision for the CFO role, clearly articulating how your strategy will align with and support their goals. By clearly linking your vision to the broader organizational objectives, you'll foster trust and demonstrate that finance is not just a support function, but a strategic partner in driving business success.

Identify key stakeholders, conduct introductions, and establish cadence

Activity	Objective(s)	Timing
Identify key stakeholders	<ul style="list-style-type: none">Prepare an inventory of key stakeholders, including the CEO and other top management, board, functional leaders, and business unit heads, as well as external ones such as institutional investors, earnings analysts, and activist investors.	Days 1 – 15

Conduct meetings with key stakeholders to understand current strategies, business challenges and areas of opportunity

Activity	Objective(s)	Timing
Conduct initial stakeholder meetings	<ul style="list-style-type: none">Begin meeting with stakeholders to understand the company's business, challenges, and the role the finance department is currently playing in addressing challenges and opportunities.	Days 15 – 45

Socialize and evaluate opportunities identified, your perspective on future state vision and role of finance

Activity	Objective(s)	Timing
Conduct follow-up stakeholder meetings	<ul style="list-style-type: none">Share with stakeholders your perspective on the role you see finance playing going forward and how it aligns to their needs. Gather and incorporate their feedback. Establish a regular meeting schedule, especially with the CEO and the board.	Day 45 – 75
Assess business challenges and finance impact	<ul style="list-style-type: none">Document and prioritize your findings regarding the finance department's role, current talent, and resource capability to address the organization's key business challenges and changes needed.	Days 45 – 75

Manage Compliance and Risk Obligations

One of the core expectations of you as a CFO is to safeguard the long-term value and financial health of the organization through robust controls, compliance frameworks, and accurate reporting. As the steward of the company's financial integrity, the CFO plays a pivotal role in managing and mitigating risks that could threaten the organization's stability and growth. Effective governance, compliance and controls are not just regulatory requirements – they are essential to building trust with stakeholders, maintaining operational efficiency, and ensuring sustainable performance.

As organizations increasingly adopt AI and other emerging technologies, the CFO plays a critical role in assessing and managing the unique risks associated with these innovations. This includes ensuring that adequate controls are in place to address data privacy, security concerns, and ethical considerations. By staying informed about regulatory developments surrounding AI and emerging technologies, the CFO can help the organization navigate complex compliance landscapes while capitalizing on opportunities to drive growth and innovation.

Understand your financial, compliance, and control obligations

Activity	Objective(s)	Timing
Understand audit process and relationships	<ul style="list-style-type: none">Begin regular meetings with the audit committee chairman and auditor to understand risks, effectiveness of controls, and other issues raised in past audits; understand their expectations.	Days 1 – 20



Assess opportunities and efficiencies in controls, risk management, tax, and regulatory compliance and evaluate governance

Activity	Objective(s)	Timing
Assess fraud risk management	<ul style="list-style-type: none"> Examine status and effectiveness of current fraud risk management programs, including cybersecurity. Obtain a comprehensive understanding of the current training and preparation programs provided to employees to enhance their awareness of fraud. 	Days 20 – 50
Conduct enterprise risk management assessment	<ul style="list-style-type: none"> During stakeholder meetings, understand the company's enterprise risk management history, practices, and plan. Assess the congruity with your expectations and experience. Conduct an assessment to evaluate whether current risk reporting mechanisms and mitigation plans meet expectations identifying sources of risk. 	Days 20 – 50
Rationalize and monitor controls	<ul style="list-style-type: none"> Understand if the organization's controls environment is effective and efficient. 	Days 20 – 50
Assess regulatory reporting and compliance	<ul style="list-style-type: none"> Determine whether external reporting obligations are being met on a timely basis. Investigate the current state of internal financial controls (e.g., segregation of duties, financial close process, cash management practices, tracking of KPIs, etc.). Identify upcoming changes in external financial reporting requirements that could directly impact the organization. 	Days 30 – 50
Review tax compliance and dispute resolution	<ul style="list-style-type: none"> Understand tax filing deadlines and execution. Evaluate existing and potential disputes, examine historical filings, correspondence, and ongoing audits. Stay informed about tax law changes, proactively address issues, and collaborate with legal and financial teams to prepare for negotiations or litigation. 	Days 30 – 50
Manage and assess risk around AI adoption	<ul style="list-style-type: none"> Enhance current or develop new responsible AI framework (e.g., foundational principles, commitments, and taxonomies) to account for the unique risks presented by generative and agentic artificial intelligence while sustaining scalability and flexibility. 	Days 30 – 50
Optimize Compliance and Risk with AI	<ul style="list-style-type: none"> Assess usage of AI integration for fraud & operational risk management activities such as automated compliance monitoring and automated data anomaly & fraud detection. Evaluate usage of AI integration for enterprise risk activities such as automated risk profiling and contract risk analysis and interpretation. Identify opportunities to improve control environment through AI automation and continued controls testing. 	Days 30 – 50

Assess your Function

As CFO, your primary responsibility is to build a skilled and dependable finance department. Without a strong team, achieving success is challenging. When assessing the finance department's influence on the wider organization, it's crucial to thoroughly understand its strengths and identify any areas for improvement. This includes evaluating team competencies, information systems, and core finance processes, from transaction processing to management reporting. If substantial changes are needed in any of these areas, it's best to act sooner rather than later. An effective and efficient finance function not only builds confidence but also enables you to enhance the finance team's impact on the broader business. Additionally, an innovative CFO will look towards the future of finance and evaluate opportunities to evolve the finance operating model through automation and AI.

Understand current cost of finance, operating model, talent strategies, and levels of process standardization and benchmark against industry peers

Activity	Objective(s)	Timing
Understand the cost and value delivered by the finance function	<ul style="list-style-type: none"> Review the most recent plan for the finance function (e.g., Cash Flow, Accounting practices, and Audit concerns). Understand how and where costs are incurred. During stakeholder meetings, inquire whether company leaders are aware of the value of finance and if costs are transparent for services provided. Evaluate impact and potential benefit of AI on enterprise strategy, business model, operations and workforce. Specifically, assess how AI can empower your vision by identifying areas where adoption can improve productivity & increase profitability. 	Days 20 – 30
Compare functions' performance to competitors	<ul style="list-style-type: none"> Benchmark function against peers across key efficiency metrics (e.g., total finance costs as a percentage of sales, # of manual journal entries, etc.). 	Days 20 – 30
Examine finance delivery model	<ul style="list-style-type: none"> Evaluate use of and opportunities for shared services, outsourcing, and centers of excellence; begin review of current state of IT solutions' capabilities to support delivery model. Determine whether scope of CFO role is expanding to cover any nonfinancial shared service functions. 	Days 20 – 30
Evaluate finance and accounting policies	<ul style="list-style-type: none"> Ensure finance and accounting policies and procedures are appropriate with compliance and regulatory requirements. Evaluate alignment with main business objectives and benchmark policies against industry best practices. Assess cash management and other treasury functions. 	Days 30 – 50
Assess staff skills and initiate talent management	<ul style="list-style-type: none"> Identify the modern skillsets you will need, now and in the future, to make finance a strategic partner to company leadership. Evaluate strengths (including high performers) and weaknesses against priorities and begin to plan how you will fill skills gaps. Identify opportunities to upskill your talent to meet current and future needs via L&D curriculum (e.g., data & analytics tools and AI trainings) or rotational programs. Review recruitment and retention capability; ensure there is a clear finance professional career path (in balance with outsourcing and automation). 	Days 30 – 50

Understand current cost of finance, operating model, talent strategies, and levels of process standardization and benchmark against industry peers (cont.)

Activity	Objective(s)	Timing
Evaluate month-end / quarterly close and reporting	<ul style="list-style-type: none"> Identify inefficiencies observed during the recent financial closing cycle and prioritize AI use cases that streamline processes by automating data collection, reconciliations, reporting, and predictive analytics to enhance efficiency, reduce manual effort, and improve accuracy in financial close activities. Evaluate current levels of efficiency and effectiveness of transaction processing. Transact-to-report and plan-to-act: Is the close cycle reasonable? Are reports—to management and board—effective and distributed in a timely way? 	At Close

Evaluate opportunities to evolve finance operating model through AI and automation

Activity	Objective(s)	Timing
Conduct review of standard global automated processes	<ul style="list-style-type: none"> Conduct review to determine future-state IT solution strategy to support finance operating model, including opportunities in digital labor, mobile technologies, and cloud enterprise resource planning; begin to outline roadmap to execute the strategy. Determine if there are opportunities to lower costs and increase efficiency and effectiveness through standardization. Evaluate ongoing finance IT projects. 	Day 50 – 60
Consider tax function transformations	<ul style="list-style-type: none"> Assess tax department capabilities and efficiency. Understand opportunities to strengthen performance, including outsourcing. Identify potential gaps in state of tax compliance, reporting and data management. Meet with tax department leaders, finance team members and other relevant stakeholders. Explore tax software and ERP systems to improve functionality. 	Day 60 – 70
Optimize Financial Operations with AI	<p>Explore AI / bot opportunities to optimize function efficiency & accuracy in the following areas:</p> <ul style="list-style-type: none"> Finance Control: Automation of financial close, intelligent reconciliation, and intelligent transaction processing through AI empowered GL analysis to increase efficiency, speed, and standardization of accounting processes and AR/AP functions. FP&A: Intelligent forecasting analysis, anomaly detection, cost management optimization and predictive analysis, and peer analysis to gain enhanced trust in data, speed of analysis, and quality of content created by FP&A team. FinOps: Development of RPAs for invoice matching, email monitoring for customer/vendor inquiries, and contract drafting to decrease repetition of manual tasks. 	Day 45 – 75

Understand Data to Drive Insights

Consistent, timely, and accurate information is essential for empowering the organization to make informed decisions, minimize risks, and accelerate value creation. This capability lies at the heart of the finance function and is one of its core responsibilities. By providing clear and reliable financial insights, finance enables strategic decision-making, enhances operational efficiency, and ensures alignment with the broader business objectives.

However, delivering this information efficiently and effectively is often a significant challenge for many finance organizations. Inadequate processes, siloed data, or inefficient systems can result in delays, limited scope, or the emergence of “shadow” finance roles. These decentralized functions may lead to discrepancies and “multiple versions of the truth,” which undermine decision-making and create confusion or misalignment across the business.

As you start your journey as the CFO, you will gain a deeper understanding of how the organization’s financial strategy directly supports and aligns with its financial targets. It’s critical that the operating model is fully integrated with the organization’s overarching business model and goals. This alignment is not only for achieving operational efficiencies but also for ensuring that financial insights drive strategic growth.

The finance function is evolving from simply providing transactional support to becoming a strategic enabler. To achieve this the operating model must foster collaboration, streamline data flow, and ensure that key financial information is accurate, accessible, and timely across all levels of the organization. Only by building a cohesive, transparent, and agile finance ecosystem can you ensure that the organization is well-positioned to respond to changing market conditions, optimize value creation, and sustain long-term success.

Assess enterprise data management strategy and alignment to business operating model

Activity	Objective(s)	Timing
Assess alignment of operational systems with financial goals	<ul style="list-style-type: none">Understand how the operating model, including the analytic and decision infrastructure, is aligned with financial targets.Ensure key performance indicators are defined based on the organization’s vision and strategy.	Days 20-40
Understand enterprise data management strategy	<ul style="list-style-type: none">During stakeholder meetings with information technology (IT) function members, understand how the organization manages data so that you can assess the company’s maturity and data integrity.Conduct a review of current data to ensure it is complete, accurate, and of high quality to drive outcomes with business ready data sets.Understand current Data Governance framework to ensure accuracy, security, and compliance are maintained.	Days 20-40

Gather and determine data accuracy, availability, and efficacy

Activity	Objective(s)	Timing
Assess data gathering and analytics	<ul style="list-style-type: none">Establish whether the finance department has the right processes and technology tools to aggregate data and facilitate analysis and decision support.Ensure tools are tracking appropriate financial and nonfinancial metrics to measure success toward financial targets.Evaluate the current utilization of AI within the organization, and the proficiency of team members in leveraging AI tools to identify gaps in skills or usage that may hinder productivity and innovation.	Day 40-60

Analyze profitability and assess budgeting and forecasting efficiency

Activity	Objective(s)	Timing
Analyze profitability	<ul style="list-style-type: none"> Understand the company's products, markets, customers, and pricing, including strengths, weaknesses, and trends. 	Day 60
Assess sales, operations, and financial budgeting and forecasting	<ul style="list-style-type: none"> Evaluate whether forecasts and budgets are meaningful and accurate. Analyze the effectiveness of the operational planning and forecasting processes to help drive business performance. 	Day 75

Drive your Vision

As the new leader of finance, establishing and clearly communicating your vision for the future of the organization is necessary to ensure alignment across your team and the strategic objectives of the business. The vision must go beyond operational goals; it should be a compelling roadmap that positions finance as a key enabler of the organization's overarching strategy. The vision set should inspire confidence, foster collaboration, and motivate the team to embrace change and innovation. It is critical that the finance function not only supports but actively drives the business's growth trajectory. As part of this process, identify and empower key leaders within the finance organization to serve as change agents. Prioritize identifying near-term opportunities where the finance function can make an immediate and measurable impact. By articulating a clear and actionable visions and strategy, you lay the groundwork for the transformative impact you will have as CFO.

Socialize vision and receive sign-off

Activity	Objective(s)	Timing
Articulate vision	<ul style="list-style-type: none"> Refine the finance "vision" to clearly articulate the goals of your administration, establishing linkage to overall business strategy. Here are a few questions to keep in the back of your mind: <ul style="list-style-type: none"> Who are the key individuals crucial to the organization's future success, and who should be included in the finance leadership team? Which processes and activities have been digitized, and where is more technology needed? Where should change be actively pursued? Identify and strategically link initiatives for measurable value. 	Day 75
Identify lieutenants	<ul style="list-style-type: none"> Recognize high performers who can help champion and drive your vision. Team members who are seen as leaders can support the transformation more efficiently than you can on your own. 	Day 75
Summarize areas of improvement	<ul style="list-style-type: none"> Develop your agenda, based on your learnings so far. List the output of your assessment, identifying inefficiencies, skills gaps, unmet goals, and other weaknesses as well as opportunities. 	Day 75 – 90
Prioritize agenda	<ul style="list-style-type: none"> Prepare for and guide finance leadership through strategic discussions – defining future state aspirations, desired capabilities, critical enablers and North Stars. Prioritize list of initiatives to enable future state aspirations by identifying roadmap of quick wins and longer- term initiatives. 	Day 75 – 90

Finalize Roadmap

Activity	Objective(s)	Timing
Complete and prioritize roadmap	<ul style="list-style-type: none"> Complete the roadmap for transformation developed from previous steps and prioritize the actions to address challenges and opportunities; consider potential roadblocks and develop plans to address them. Engage people at all levels of finance and make them feel they are active partners in owning the vision, so they continue to be motivated to execute the roadmap. Consider change management strategy and plan to enable future state roadmap. 	Days 90 – 100



Target Operating Model

As you assess your finance function, using a target operating model (TOM) driven approach will provide a more holistic view. The KPMG TOM structure is based on functional processes, supported by people, service delivery model, technology, performance insights and data, and governance. When integrated together, these six design layers comprise a simple and efficient model for the TOM.

Organizations must strategically embed AI within their existing transformation initiatives, aligning it with the operating model and system architecture to enhance effectiveness.

Governance

Outlines the structures, policies and controls to balance risk, to facilitate timely and effective decision making and ensure compliance.

Performance insights and data

The data and analytics required to inform business critical decisions and future-proof business performance – plus the related master data structures to enable these.

Technology

Describes the technologies required to drive the delivery model, business practices and performance ambitions and how technology applications are integrated.

Functional process

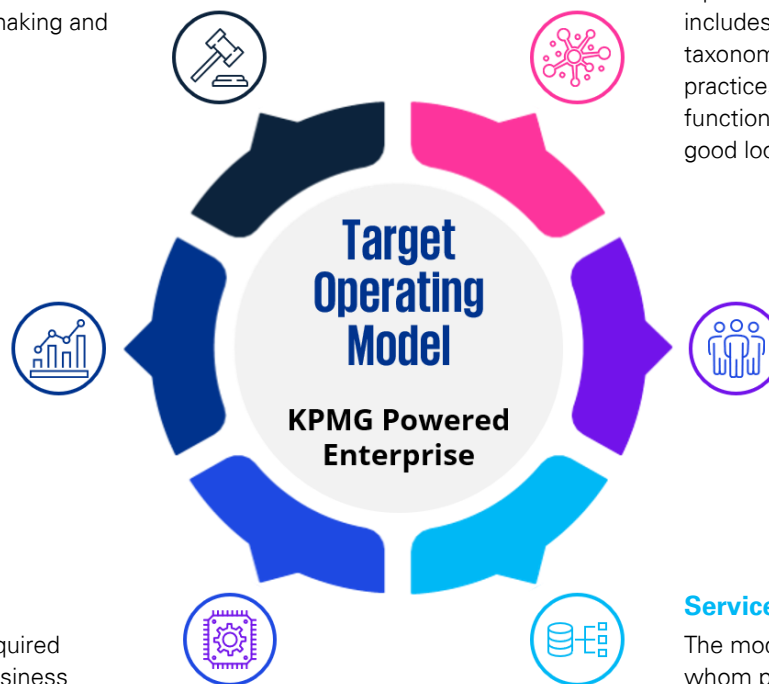
The backbone of the KPMG Target Operating Model, this design layer includes the maturity models, process taxonomies, process flows and leading practices that describe the optimal functional operation, depicting 'what good looks like.'

People

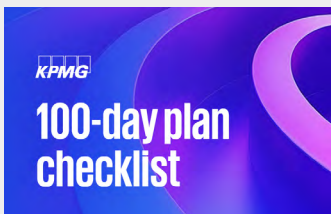
The roles, organizational relationships, competencies and skill requirements needed to execute the process areas. This layer intersects with the functional process layer to describe who does what.

Service delivery model

The model that defines where and by whom processes should be optimally performed. It describes incremental components required to run and operate a shared services center.



100-day CFO checklist



100-day plan checklist

This checklist is a compilation of the key activities and is intended to serve as a quick reference printout guide.

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Voice of the CFO

A recurring conversation with CFOs on finance-related issues.

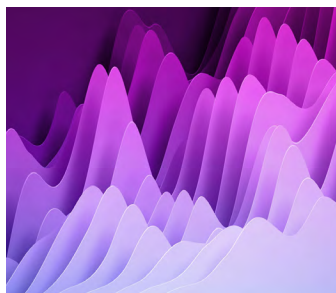
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KPMG Ignition

Start here. Go anywhere. Wherever you are, we'll help you go where you never imagined.

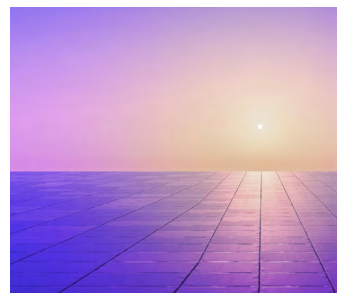
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Applying advanced analytics and Artificial Intelligence (AI) to power decision making and improve profitability.

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The CFO agenda for elevating finance.

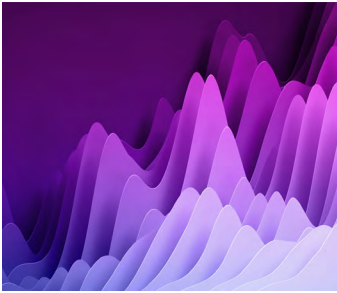
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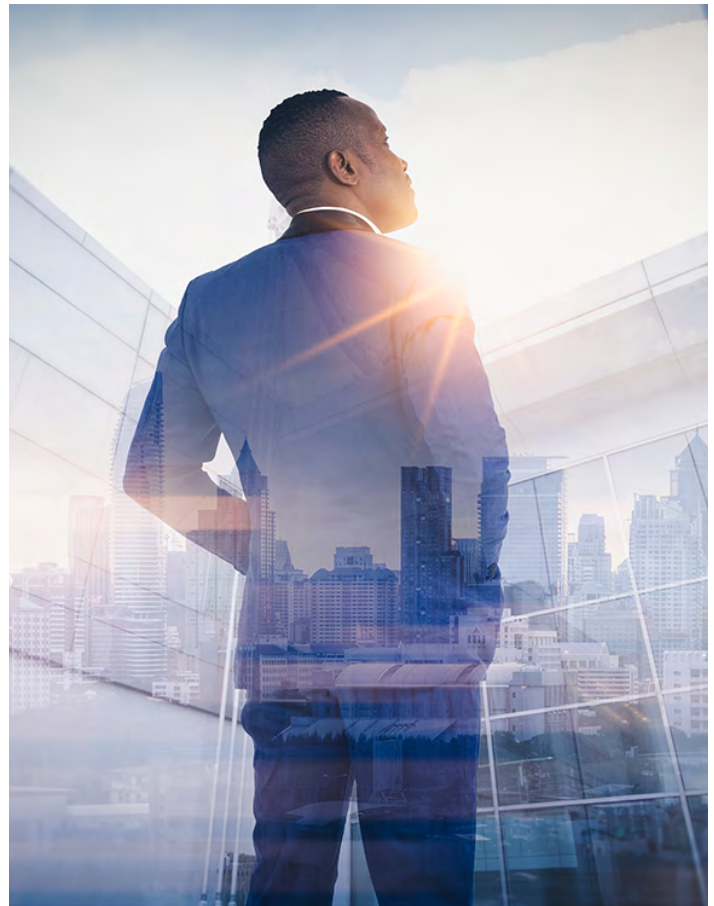
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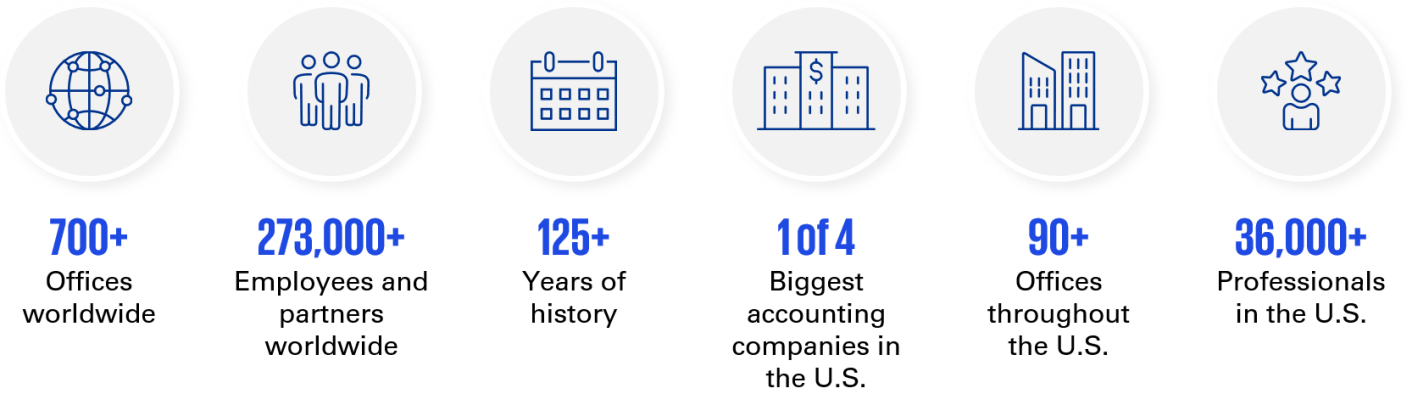


KPMG at a glance

Our story

At KPMG, we come to work every day because we are passionate about solving the business challenges that keep you up at night. The partners and professionals in the U.S. member firm have a rich understanding of the realities of your industry, because they have been there themselves. Some of the best and brightest in their fields, our people work directly alongside companies of various shapes and sizes, in all 50 states, to pinpoint and deliver practical, customized business services that drive real results.

That is why in times of both opportunity and uncertainty, the biggest names in business trust KPMG to provide the clear direction they need to deliver against today's demands while anticipating the vast possibilities of tomorrow.



Our values

Our values lie at the heart of the way we do things and define our culture and our commitment to the highest principles of personal and professional conduct.



Integrity



Excellence



Courage



Together



For Better

Our Values are a differentiator at KPMG. When we all live by our Values, we create trust among each other to be the best we can be. Ultimately, our Values are core to who we are and what it means to work at KPMG.

Our Values are the foundation of everything we do and every action that we take. They inform how we act and the decisions we make, and they guide how we work with clients, stakeholders and each other.

Integrity. We do what is right.

Excellence. We never stop learning and improving.

Courage. We think and act boldly.

Together. We respect each other and draw strength from our differences.

For Better. We do what matters.

**Experience
our Values
in action.**



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