

Collaborating to Win

Cross-Functional Alignment Elevates Strategy & Finance

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Presentation was co-created using AI. No financial analysts were harmed during the creation this presentation!

SESSION GOAL

Honest dialogue about practical business partnering beyond polished theories.

OUR PANELISTS

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Controller

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Analyst

Internal
Auditor

Sr.
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Associate

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Director, FP&A

FP&A, Manager

Senior
Financial
Analyst

Financial
Analyst

Real Talk on Business Partnering



Reframe FP&A Role

Shift from scorekeeper to strategic business partner

Overcoming 'No' Stereotype

Transform 'no' into 'not right now'

Career Growth in FP&A

Success through forecasting and curiosity; leadership success via cross-functional alignment and cadence.

Partnership as Practice

Partnership is built through shared metrics, iterative engagement, and pre-wiring decisions, not personality traits.

From 'Scorekeeper' to 'Partner'



Focus on Business Drivers

Shift focus from financial outcomes to operational drivers

Partnering Through Questions

Use specific questions to unlock business stories

From Control to Collaboration

Move from policing roles to partnering roles by co-designing tradeoffs and using driver-based narratives.

Effective Communication

Avoid defensive language by focusing on changes in drivers and options, fostering trust and productive dialogue.

Building Credibility



Credibility as Currency

Credibility earns business invitations

Key Credibility Signals

Reliability, speed, clarity, and honesty are credibility signals

Building credibility over time

Early engagement, learning beyond spreadsheets, and proactive preparation

Credibility Formula

Accuracy + Clarity + Consistency
+Curiosity

Shared KPIs Drive Alignment

Credibility earns business invitations

Co-Ownership Prevents Scorecard Pitfall

Avoid a finance-only scorecard

Connecting Operations to Executive Narrative

Aligning line level realities with corporate strategy

Pragmatic Data Approach

Using 'good enough' data

Shared Metrics



Pre-wiring Strategy

Influence can be shaped before meetings

Balancing Challenger and Partner Roles

Use specific questions to unlock business stories

Techniques for Advancement

Use of staged investments & pilot metrics to move forward amidst uncertainty.

Influence without Authority



Build Cross-Functional Trust

Credibility earns business invitations

High Value Questioning Skills

Reliability, speed, clarity, and honesty are credibility signals

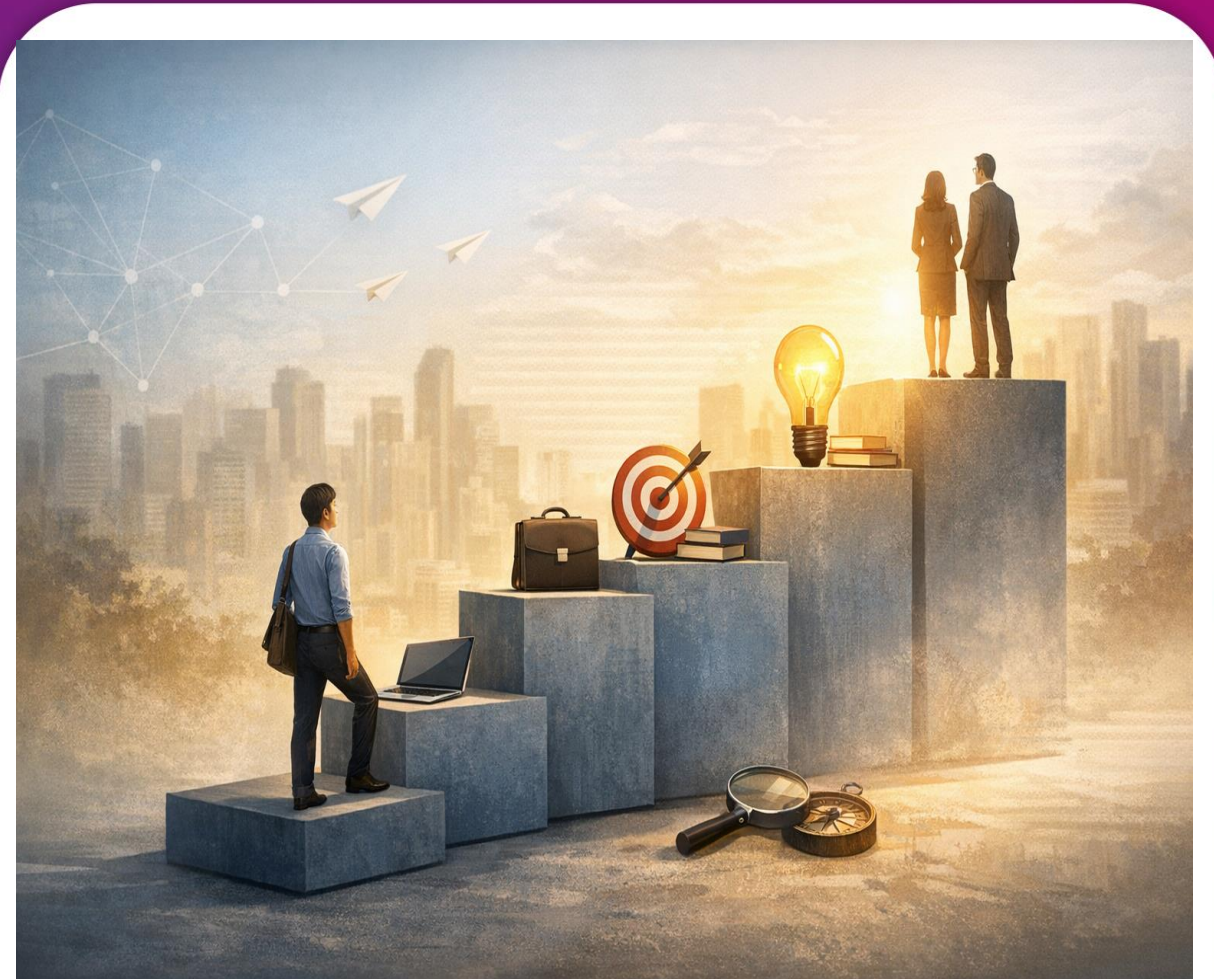
Practical Behavioral Advice

Early engagement, learning beyond spreadsheets, and proactive preparation

Career Growth Through Value

Accuracy + Clarity + Consistency
+Curiosity

Early Careerist



AFP FP&A FORUM



Turning Point
Domestic Violence Services



MELVIN AND BREN SIMON
COMPREHENSIVE
CANCER CENTER

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Lighting Round



Q&A