

**“How I Built This: FP&A For
Today and Tomorrow”**

By attending this session, you will learn ...

- **FP&A Function Roadmap** – Real-world insights on leveraging a framework for establishing a multi-pillar roadmap (People, Process, Technology) for building a world-class FP&A function aligned to the AFP FP&A Maturity Model.
- **Organizational Dynamics** – Tips and tricks for executing the journey including codifying & communicating the FP&A value proposition, managing the transition from today to the future state, and navigating resistance.
- **Recipe for Success** – Critical enablers, pitfalls to avoid, and elements of the “secret sauce” for navigating the journey.

Today's Speakers

MOMENTUM CFO 

Rosemary Linden

President

rosemary@momentumcfo.com

(858) 284-0314


Mayzón

Brad Frankel

Chief Financial Officer

bradf@mayzon.com

(703) 946-5412



Jeff Altman

Former Senior Director, Exec Ops – VCG GRO

jalt0629@gmail.com

(571) 426-3384

Peloton
CONSULTING GROUP

Philip Peck

VP FP&A Transformation & Advisory

ppeck@pelotongroup.com

(773) 251-2138

Peloton Consulting Group



Advisory

Imagine The Possible



Consulting

Deliver Results



Managed Services

Manage The Application

Innovative Methodologies

Fit-to-Modern | Breakaway™

Innovative & Collaborative Approach

Solutions

EPM | ERP | SCM
HCM | CX
PaaS | WMS | Primavera

Transformation

Process Design | Best Practices
Technical Expertise
Information Strategy
Enterprise Change Management

Global Delivery

Local Consultants in
North America,
Latin America & Asia Pacific

Oracle

Certified Experts with Years of
Industry & Solution Experience

Industry

Retail | CPG | Manufacturing
Financial Svc. | Professional Svc.
High Tech | Wholesale Distribution

Momentum CFO

What We Do

Momentum CFO provides fractional CFO and FP&A leadership that drives better business decisions.

Who We Serve

Organizations building or elevating their FP&A function

What We Deliver

- FP&A operating models and scalable team infrastructure
- Reporting frameworks for executives, boards, and investors
- Structured planning and driver-based forecasting enabled by robust data and technology foundations
- Experienced leadership that strengthens internal capability and develops FP&A professionals

MOMENTUM CFO >>>



Mayzon

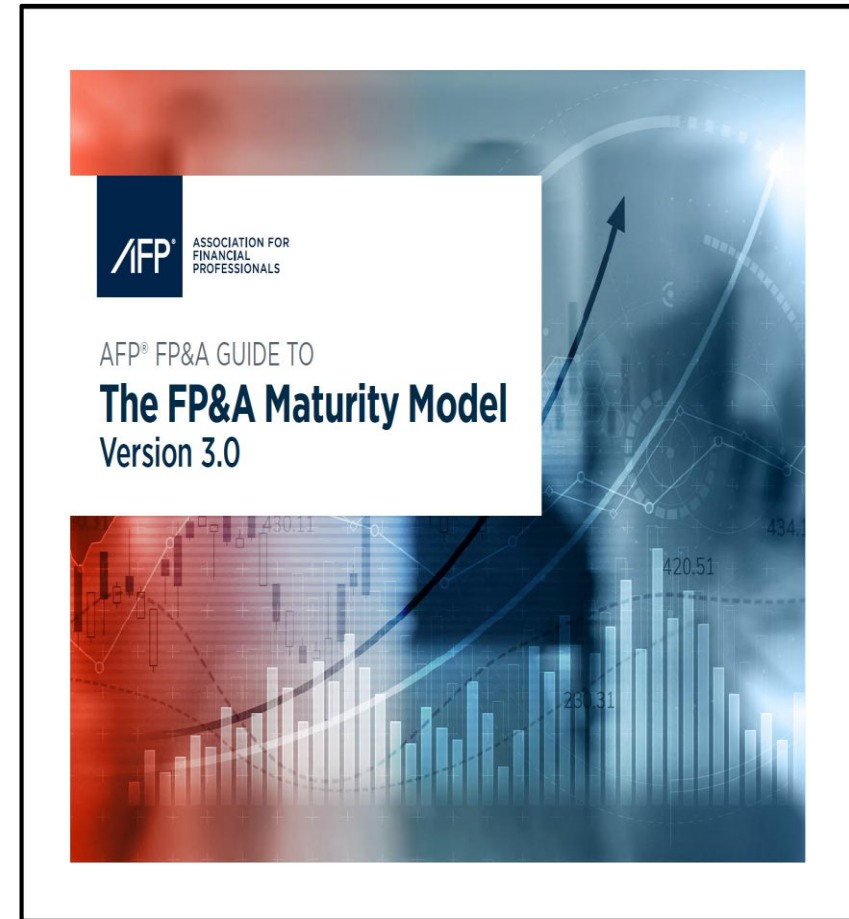
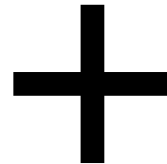
Mayzon is a leading designer, manufacturer, and marketer of bath and home organization products. Founded in 1929 and headquartered in New York City, the company provides innovative solutions that help consumers create comfortable, organized living spaces.

Through brands such as Zenna Home and private-label partnerships with major retailers, Mayzon's products—including shower rods, curtains, bath furniture, and storage solutions—are sold across North America through both brick-and-mortar and online channels.

The Mayzon logo features the word "Mayzon" in a teal, sans-serif font. A stylized blue house icon is positioned above the letter 'o'.The RGI Home logo features the letters "RGI" in a large, bold, serif font, with the word "HOME" in a smaller, spaced-out, sans-serif font below it.

AFP FP&A Resource Guides

FP&A Maturity Model & Building an FP&A Function



FP&A Manifesto – Canvassing the Audience



Question

What are the top 1 – 2 key elements of your FP&A function mission and vision that conveys the role of FP&A within the context of the CFO Office ?



FP&A Manifesto – The Holy Grail



Modern FP&A functions must be indispensable business partners who help drive business strategy & execution, efficiently leverage tools & technology, develop accurate plans & forecasts, optimize the allocation of scarce resources, deliver forward looking insights & analysis, and enable optimized decision-making in a complex and uncertain environment.

Question #1 – Embarking on the Journey

Getting Started

- What framework(s) have you used to
 - Establish the FP&A function end-state vision
 - Assess and baseline current capabilities
 - Complete fit-gap analysis
 - Define roadmap for building out the FP&A function



Question #2 – Organization Design & People

Organization

- How did you determine the best organization structure for your FP&A function ?
- What key factors influence the org structure design ?



People

- What are the required knowledge, skills, abilities, and experience that align with the FP&A org structure ?

The image shows a 'Team Skill Capability Assessment Matrix' with a grid of colored cells representing skill levels for different team members across various skill categories.

Team Members	Skill							
	Business Strategy	Global Strategy	Team Management	Leadership Management	IT Skills	App. Test Case	App. Test Plan	App. Test Run
1. Michael Smith	4	3	4	3	3	3	3	3
2. Jane Smith	3	3	3	3	3	3	3	3
3. Alex Smith	3	3	3	3	3	3	3	3
4. Paul Smith	3	3	3	3	3	3	3	3
5. Mark Smith	3	3	3	3	3	3	3	3
6. Lisa Smith	3	3	3	3	3	3	3	3

Legend:
4 - Expert
3 - Advanced
2 - Proficient
1 - Novice

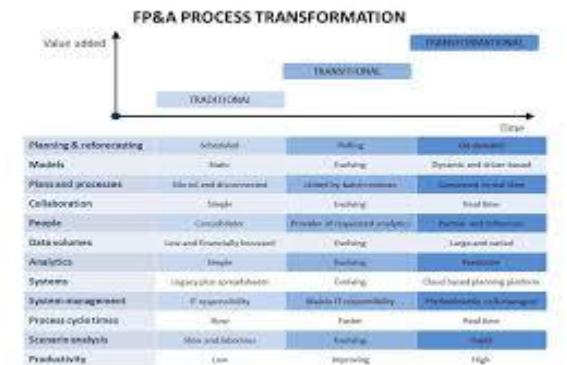
Question #3 – Business Processes

Scope, Definition, Delivery

- How did you define the scope and prioritization of the landscape of FP&A activities & responsibilities ?
- What role does business process design / redesign play in delivering on the FP&A Manifesto ? Are there specific areas you tackle first and why ?
- How did you navigate the dynamic between Accounting / Controllership activities vs. FP&A activities and the often-grey area for specific responsibilities ?

Finance and Financial Processes

CATEGORY	ELEMENTS	FOUNDATIONAL (HINDSIGHT)	EMERGENT (INSIGHT)	FUTURE-FOCUSED (FORESIGHT)
WHAT: FINANCE AND FINANCIAL PROCESSES	Integrated Planning, Budgeting and Forecasting	Recorder of the budget. The plan/budget is inflexible and is used to measure performance. It is tied to the general ledger and is developed top-down, with minimal business input. The forecast is heavily influenced by a desire to get back to budget. Money is allocated to business rather than specific work, and reallocation is rare. The budget requires 6-9 months of effort; re-forecasts occur < 4x per year. The overall process is laborious and prone to error, omissions and inconsistencies.	Plan facilitator. The one-year plan/budget is a strategic coordination tool involving negotiated budget commitments shared across business units. Budgets require 3-6 months to create, monthly or quarterly forecasts provide honest appraisals of performance, incorporating actual results and trends. Teams discuss variances to budget, consider risks and opportunities, and create scenarios. Resource reallocation may happen during the year.	Strategic alignment. The plan bridges long-term strategy to medium- and short-term operational activities, financial performance and risk framework. It is relied upon frequently in business discussions. Forecasts provide accurate assessments of direction and can be created on demand. Capital can be reallocated throughout the year. Budgets ensure accountability for enacting the plan and transparency in activities.
	Leading practices	<ul style="list-style-type: none"> Collaborative, integrated planning across the entire enterprise creates vertical alignment from the board and senior management through P&L owners, and horizontal alignment connecting adjacent businesses and processes. Finance and operations planning cycles are in sync, capital and operational expenses are linked in the financial outlook. The business owns the forecast/budget, and FP&A facilitates the process through formal project/process methodologies, coordinated assumptions and metrics, and effectively challenging the business. Mid-year updates and variances drive accountability. Forecasts are frequent, honest appraisals of expected performance, independent of budget. Rolling forecasts and driver-based forecasts are implemented to maintain future focus on the most important aspects of the business. Reasonable effort is required to develop forecasts (e.g., < 1 week) and budgets (e.g., < 2/3 months). Risks and opportunities are identified at multiple entity levels (corporate, unit, product/services). This process includes developing scenarios and sensitivities ("what-ifs") and considering potential contingency plans and levels of financial flexibility. Organizational resources are reallocated throughout the year, including capital, people, services, etc. The external environment (political, economic, social, technological, legal/regulatory and environmental) is monitored to raise awareness as appropriate and incorporate the impact on value drivers through plans, forecasts and investment activities. 		



Question #5 – Roadmap Execution

Blueprint for Success

- What are key enablers to executing your FP&A function vision ?
- What are key pitfalls to avoid ?
- How do you ensure flexibility, nimbleness, and agility as you execute the roadmap ?



Question #6 – Navigating the Change

Balancing Act

- As part of the journey, how do you balance mission critical day to day activities with the necessary work and changes to accelerate to the future state FP&A function ?
- Are there specific trade-offs that must be considered and how do you vet, prioritize, and make the best decisions ?



Bonus Question – “Top 3 Experience Gems”

Gems – Looking Back What I Learned

- Keys to Success
- Landmines to Avoid
- “If I had only known ...”



Q&A

MOMENTUM CFO 

Rosemary Linden

President

rosemary@momentumcfo.com

(858) 284-0314



Brad Frankel

Chief Financial Officer

Bradf@mayzon.com

(703) 946-5412



Jeff Altman

Former Senior Director, Exec Ops – VCG GRO

jalt0629@gmail.com

(571) 426-3384

Philip Peck

VP FP&A Transformation & Advisory

ppeck@pelotongroup.com

(773) 251-2138