

Level Up Your Finance Team

Coaching, Accountability, and Culture in the Next Era

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Speakers



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Agenda

- Objectives
- Motivators
- Atlas Tech Case Study
 - Breakout Group Discussions
 - Knowledge Sharing
- Q&A
- Conclusion

Session Objectives

Understand

4 key motivators

Identify

where engagement, burnout, or turnover are coming from

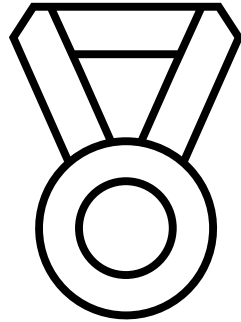
Walk away with

1 action you can implement within the next 30 days

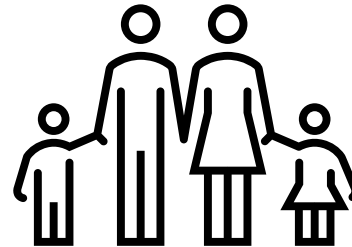
Motivators: Factors of Achievement



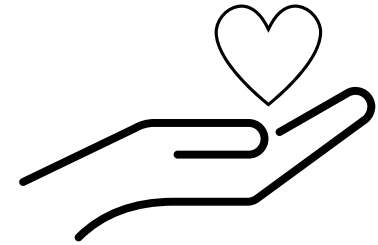
Recognition from peers



**Recognition from
respected experts or
authorities**



Family



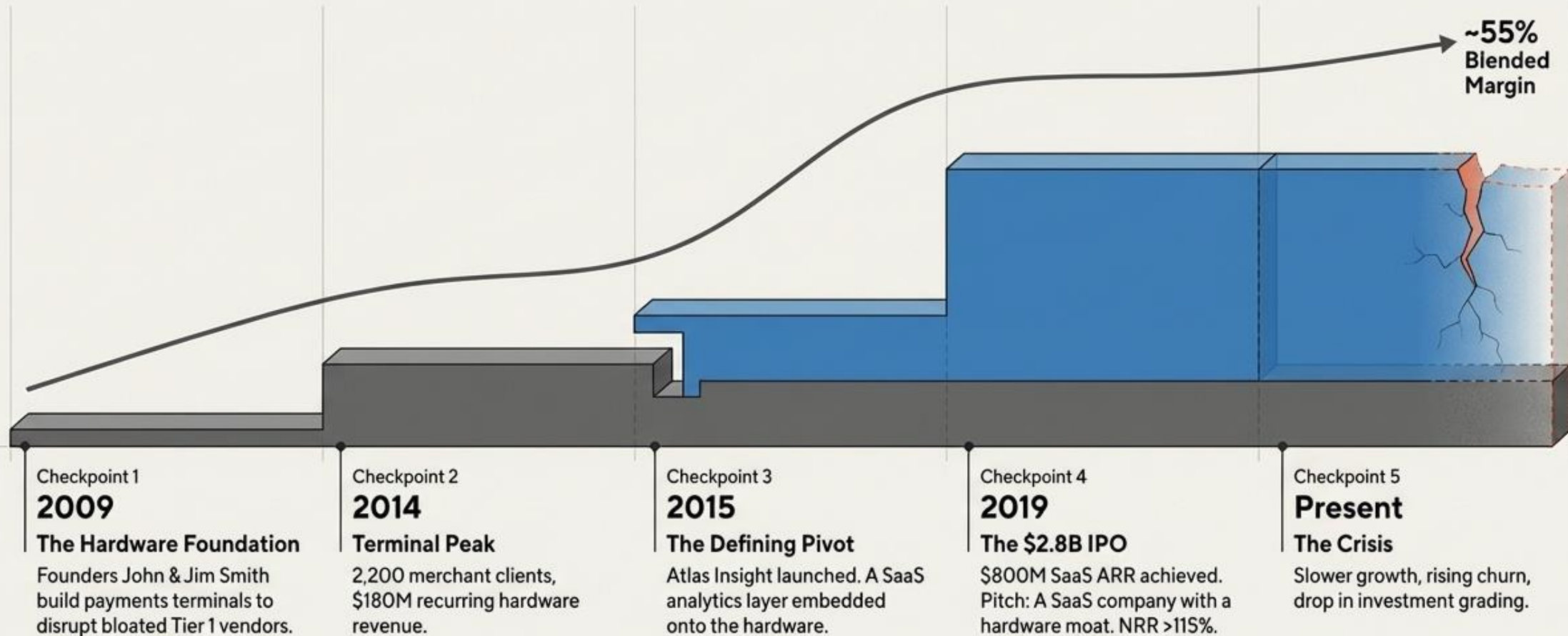
Benevolence

OPERATION ATLAS: THE 30-DAY MANDATE

Diagnosing a Systemic Forecasting Collapse and Rebuilding Organizational Credibility



The Evolution of a Moat



A \$4.5B Engine Losing Calibration

Total Revenue

\$4.5B

EBITDA ~18%

Revenue Split

SaaS: \$2.7B ARR (68% margin)
Hardware: \$1.8B (34% margin)

Growth Gap

2-Year Avg: 15% YoY
Wall Street Target: 20% YoY

Implies \$900M net new gap

Retention

112% NRR

Warning: Down from 118% two years ago

Execution

Sales Quota Attainment: 71%
620 reps, \$2.1M avg quota

The Crisis Metric

80%

Forecast Accuracy. Dropped from best-in-class 95% over 3 missed quarters.

The Board Ultimatum



We cannot have four consecutive missed quarters going into an analyst day. If FP&A cannot produce a credible forecast, we will need to reconsider whether the function is appropriately resourced and led.

Lead Independent Director, Atlas Tech Board

YOUR DIRECTIVES FROM CFO JAMIE CARR

- Restore FP&A credibility.
- Fix the relationship with Sales.
- Get the forecast under control.
- Do not lose the team in the process.

TIME HORIZON: 30 DAYS.

Caught in the Executive Crossfire

CRO - John Doe

The Growth Mandate

- Believes 20% growth requires doubling headcount.
- Mistrusts blended pipeline methodology.
- Runs a shadow pipeline outside the CRM.

CFO - Jamie Carr

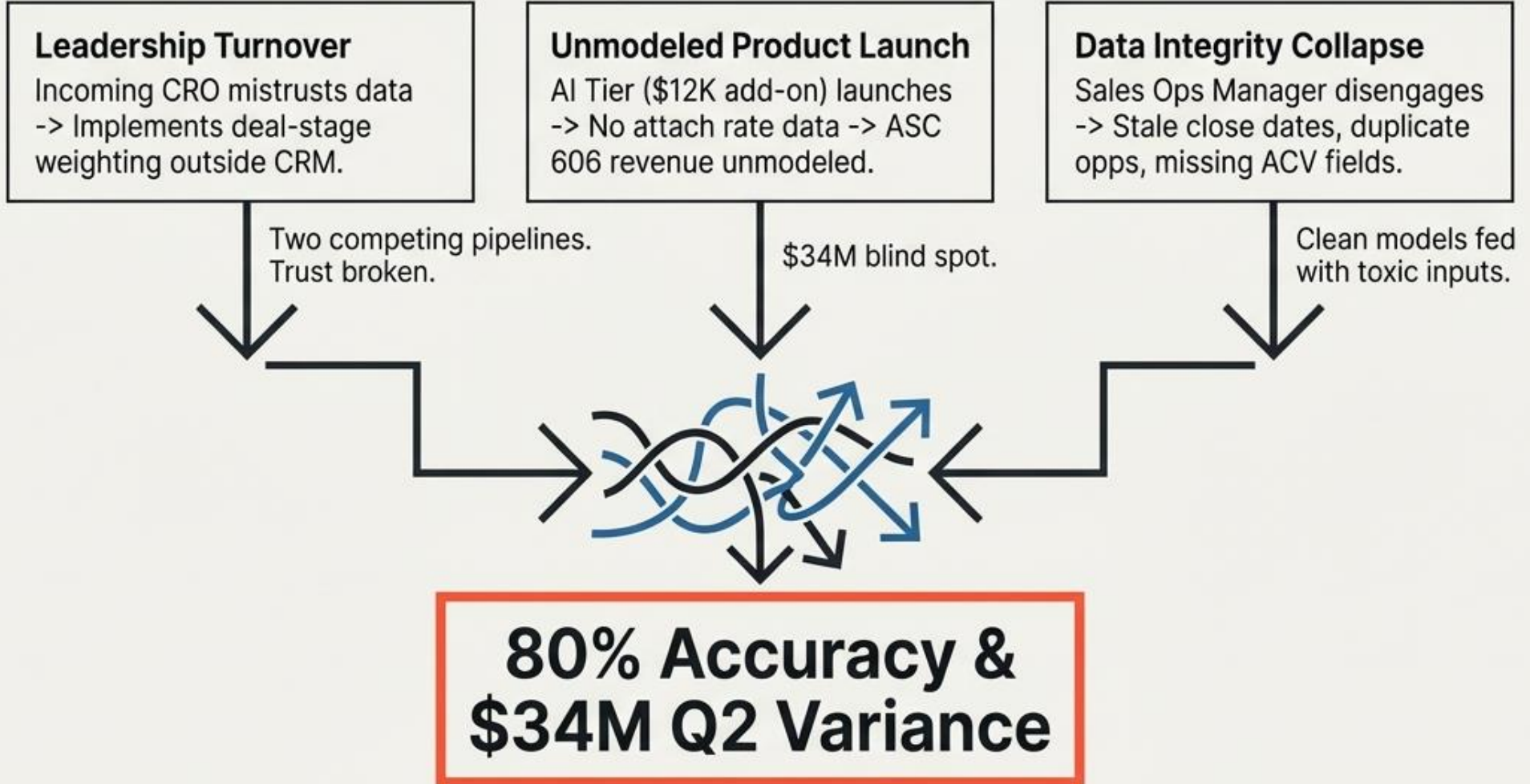
The Execution Mandate

- Believes 18-20% is achievable with discipline.
- Demands aggressive execution for the Board.
- Needs hiring approval models tightly restricted.

**FP&A
Director**

Neither side trusts
the other's data.
You are the arbiter.

Anatomy of a Missed Forecast



The Human Lever Behind the Numbers

Leadership failure is rarely about the work—it is about severing the human connection that makes the work feel worth doing.”

The \$34M variance is not a spreadsheet error. It is a symptom. It is the predictable output of a disengaged Sales Ops manager and an unmentored financial modeler. To fix the macro numbers, we must first triage the micro human connections.

The Roundtable Exercise

01

Motivation Mapping (10m).

Score the Rohn drivers and identify the highest-stakes gap.

02

Diagnose the System (15m).

Root cause analysis. What specific moment triggered James to look elsewhere?

03

Leadership Design (20m).

Formulate three targeted interventions tied strictly to Rohn motivators.

04

The One Big Move (10m).

Select a single prioritized action with the highest multiplier effect.

Instructional Callout: Assign a scribe and a spokesperson. Score authentically, not aspirationally.

Mapping the Severed Connections

The Gap Analysis

<input type="checkbox"/>	_____	
<input type="checkbox"/>	_____	
<input type="checkbox"/>	_____	
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Where is the gap between what a person is working for and what leadership is actually providing?

System Questions

The Flight Risk: What would it take to reverse James's departure in 30 days?

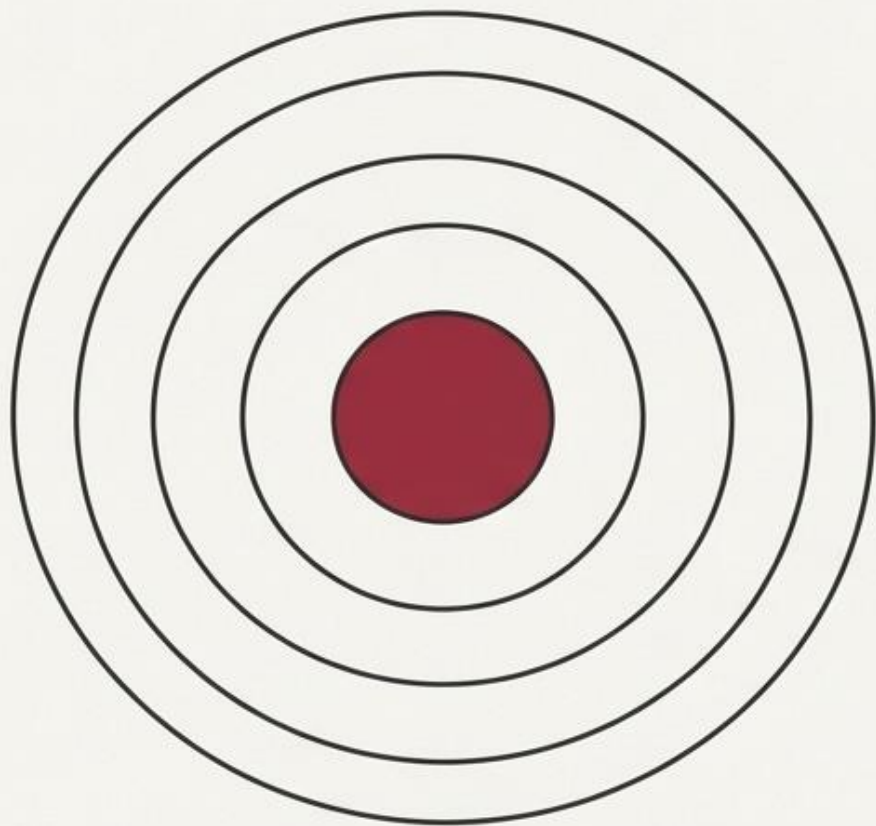
The Authority Gap: How do you restore Sarah's peer recognition when you do not formally manage her?

The Cost of Boredom: What is the exact financial risk of losing Kevin in year one?

Leadership Design Blueprint

<p>Peer Recognition Intervention</p>	<p>Who needs to be seen by colleagues, and what is the vehicle to deliver that publicly?</p> <p><i>[Example: Present Sarah Chen's pipeline integrity work by name at CRO Revenue Review].</i></p>
<p>Mentor Recognition Intervention</p>	<p>Who needs to hear from you or the CFO specifically that their contribution is valued?</p> <p><i>[Example: 1:1 with CFO Katherine Wu explicitly crediting James for the 3-statement model].</i></p>
<p>Legacy/Purpose Intervention</p>	<p>Who needs their work connected to something larger?</p> <p><i>[Example: Assign Kevin to own the \$12K AI Tier attach rate model].</i></p>

The One Big Move



1	In the next 30 days, we will... <hr/> <hr/>
2	The Rohn motivator this serves is... <hr/> <hr/>
3	This unlocks the following team performance... <hr/> <hr/> <hr/>

WARNING: What do you trade off by making this your priority? Who does not benefit—and have you accounted for that risk?

The Ultimate Operational Intervention

Motivation is not something you generate alone.
It is something you generate in relationship.
The leader's job is to be that relationship.

35 — Jim Rohn 25
30

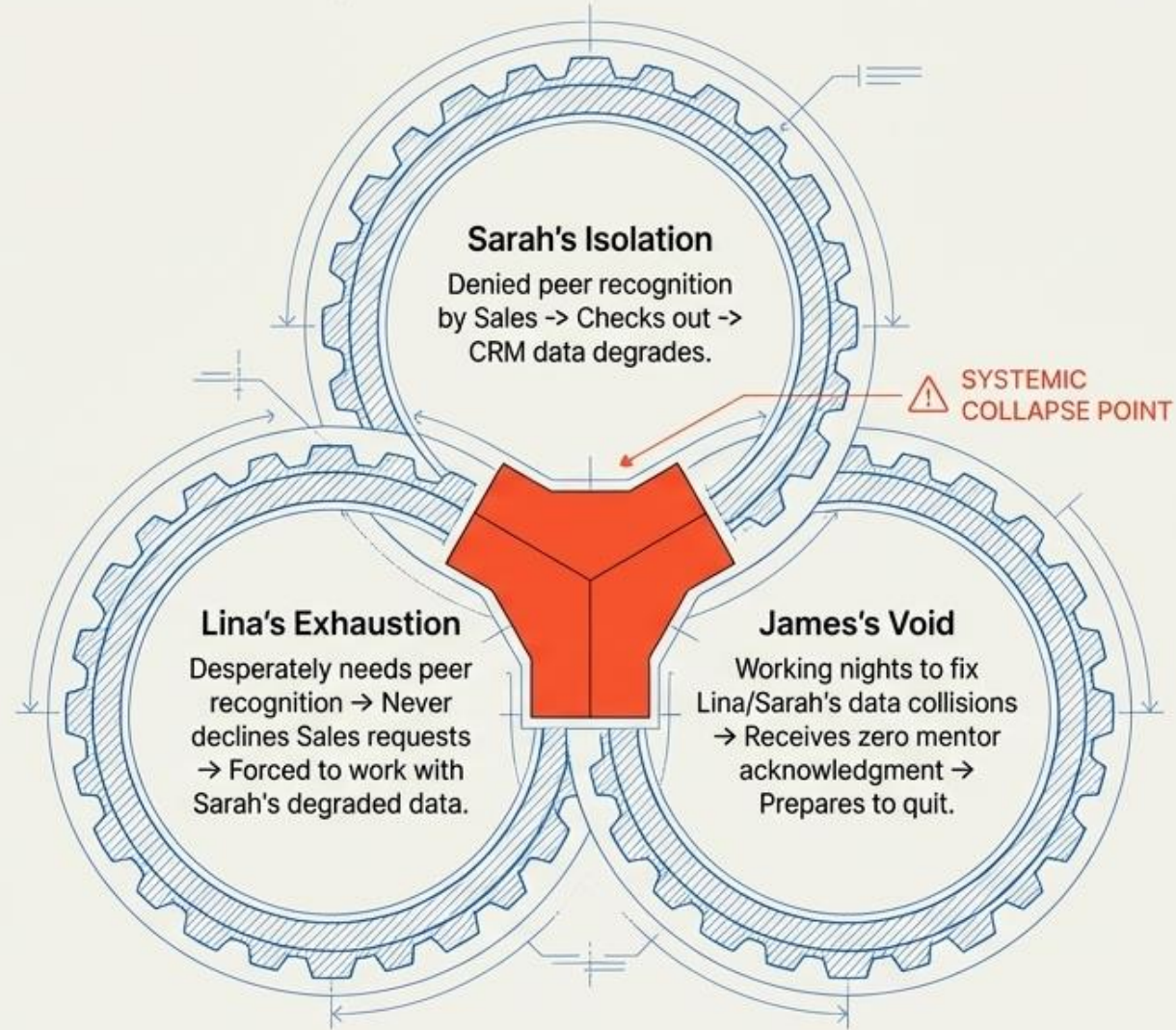
MISSION START.

You have 60 minutes.
Rebuild the team.
Fix the forecast.

FP&A Squad Triage

Name / Role	Core Driver	Unmet Need	Threat Level
Lina Torres (FP&A Manager)	Peer Recognition	Absorbs conflict, blamed by Sales, shielded team but exhausted.	⚠ Amber (Burnout Risk)
James Whitfield (Sr. Analyst)	Expert/Mentor	Built 3-statement model, ignored by CFO/Director for 18 months.	⚠ Red (Active Flight Risk)
Kevin Park (Analyst)	Legacy/Benevolence	Wants to learn the business, relegated to Excel data pulls.	⚠ Amber (Disengagement Risk)
Sarah Chen (Sales Ops - Peer)	Peer Recognition	Controls pipeline data, never in the room when decisions are made.	⚠ Red (System Risk)

Overlapping Tension Zones



Key Insight: This is not a collection of performance problems. It is a cascading leadership failure masquerading as a data issue.

Consider...

- Think about the **best finance professional** you've ever worked with
 - What motivated them?
 - What motivated you to continue working with them?
- Think about the **hardest employee** you've ever managed
 - What were they missing?
 - Where did you see the most significant disengagement for each motivator?
 - What was being under-supplied for the team member?

Q&A



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