



**/IFP FP&A FORUM**

# Speak, Lead, Succeed

Presented by Rosemary Linden & Tyler Vonderheide

# When Great Analysis Goes Nowhere

Most FP&A failures aren't about bad analysis.



# Welcome!



[LinkedIn Profile](#)

**Tyler Vonderheide**  
Sr. Mgr. FP&A  
Southwest Airlines (SWA)



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**Rosemary Linden**  
President  
Momentum CFO

# What You'll Learn Today

- Why communication matters in FP&A
- How to build trust with business partners
- How to communicate effectively to influence decisions



# Why Communication Matters in FP&A



- FP&A's role: translate financial data into actionable business insight
- Influence depends on how insight is communicated
- Common gap: overemphasizing analysis, underinvesting in communication

# Good Communication Drives Results

Teams that scored above average on the following:

## Trust

**3.3x** more efficient

**5.1x** more likely to produce results

## Communication

**2.8x** more efficient

**2.7x** more likely to produce results

**3.1x** more innovative

Source: 2024 McKinsey study

<https://www.mckinsey.com/capabilities/people-and-organizational-performance/our-insights/go-teams-when-teams-get-healthier-the-whole-organization-benefits?>

# Audience Poll

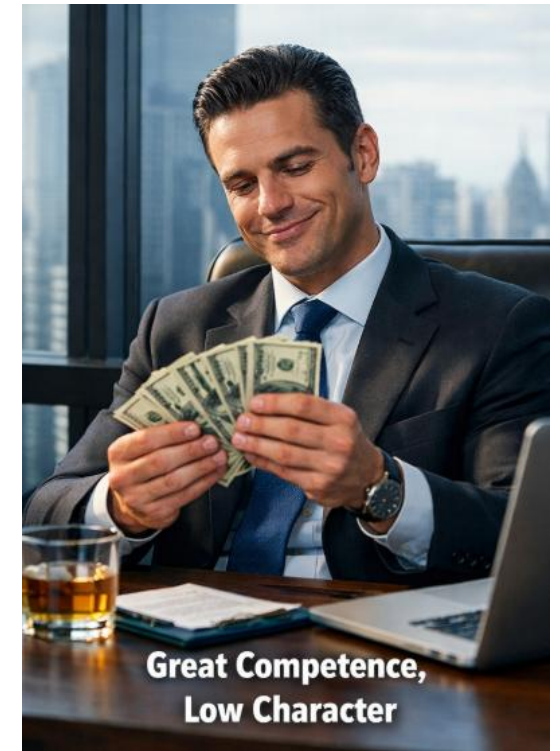
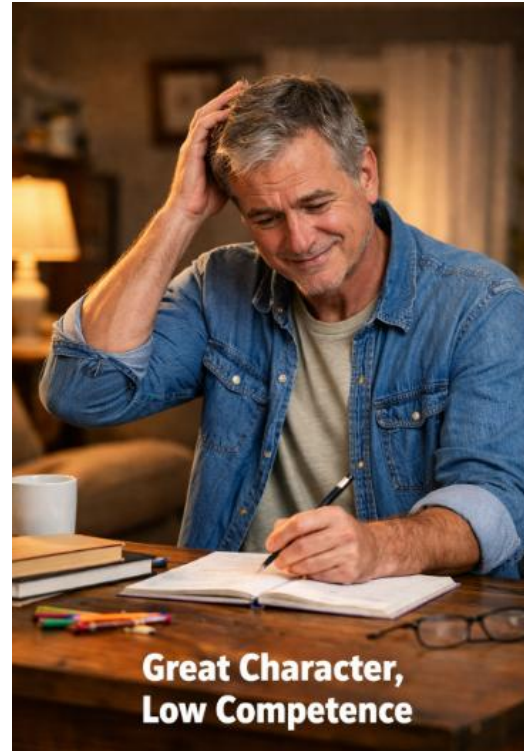
Which skill would you most like to improve?

- A. Gaining credibility
- B. Building trust with business partners
- C. Crafting a clear story
- D. Delivering insight effectively

# Building Trust for More Efficient Communication

# Building Trust

- **Trust = Credibility X Time**
- **Credibility = Character + Competence**



# Building Character



# Building Competence

Master your Material

Know the numbers, story, and implications

Align the Audience

Make the complex simple

Execute with Clarity

Share insights, not process

Communicate with  
Composure

Pace, posture, voice, and tone

Drive Follow Through

Precise next steps

# Credibility is the Gateway to Trust

Credibility = “I believe you.”

- It comes from your character + competence:
  - Know what you’re talking about (**competence**)
  - Show up consistently (**character**)
- Credibility is earned intellectually. It’s the audience’s confidence in your message and your ability.

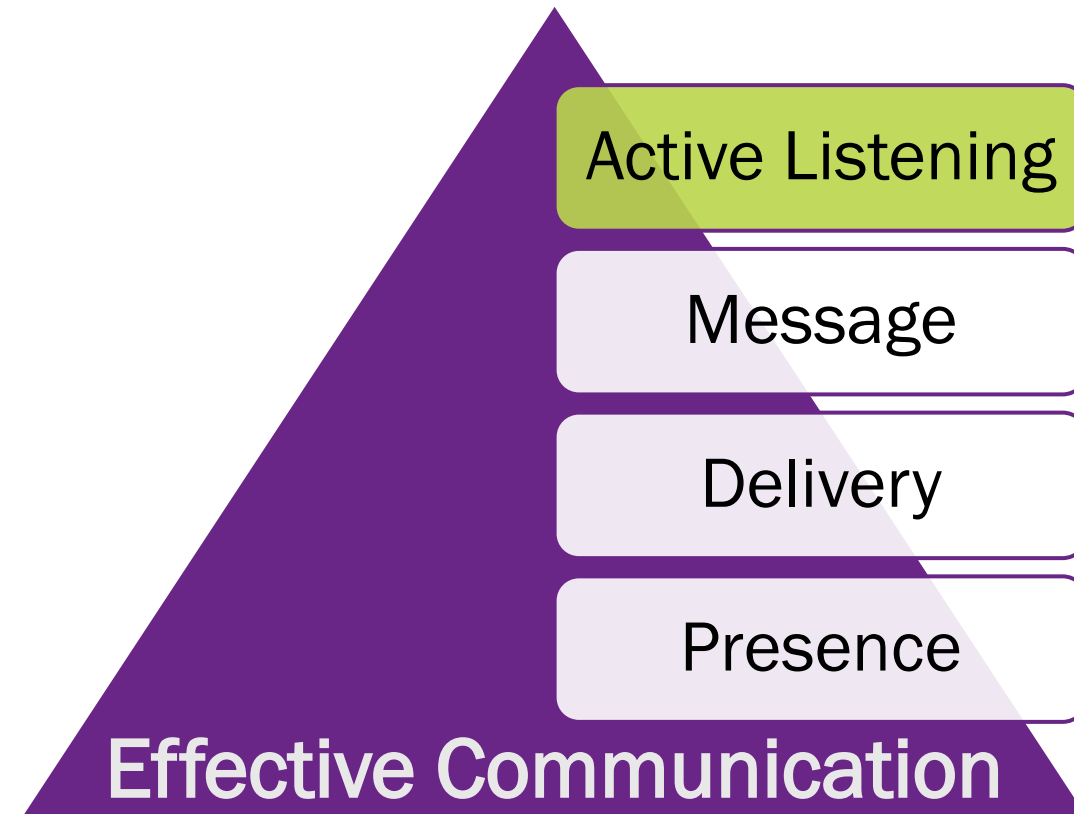
Trust = “I believe *in* you.”

- It comes from how someone **feels**
- **Trust is earned emotionally.**
- It’s the individual’s confidence in your **intentions** and your **relationship**.

# Effective Communication

# Elements of Effective Communication

- Once trust is built, effective communication keeps you listened to



# Trust Breaks When People Feel Unheard



# Active Listening at Work



Pay full  
attention

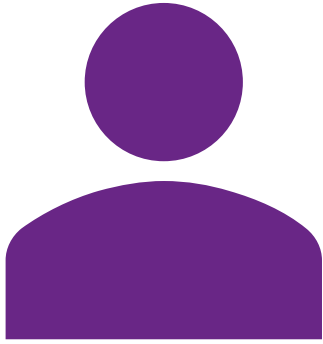


Confirm  
understanding



Respond  
based on what  
you hear

# Active Listening Demonstration



## Passive Listening

Tell us about a pet that's important to you.



## Active Listening

Tell us about a vacation you took and what made it memorable.

# Ask Better Questions

Good questions are:

- Open-ended
- Curious, not leading
- Focused on understanding before solving

What decision are you trying to make?

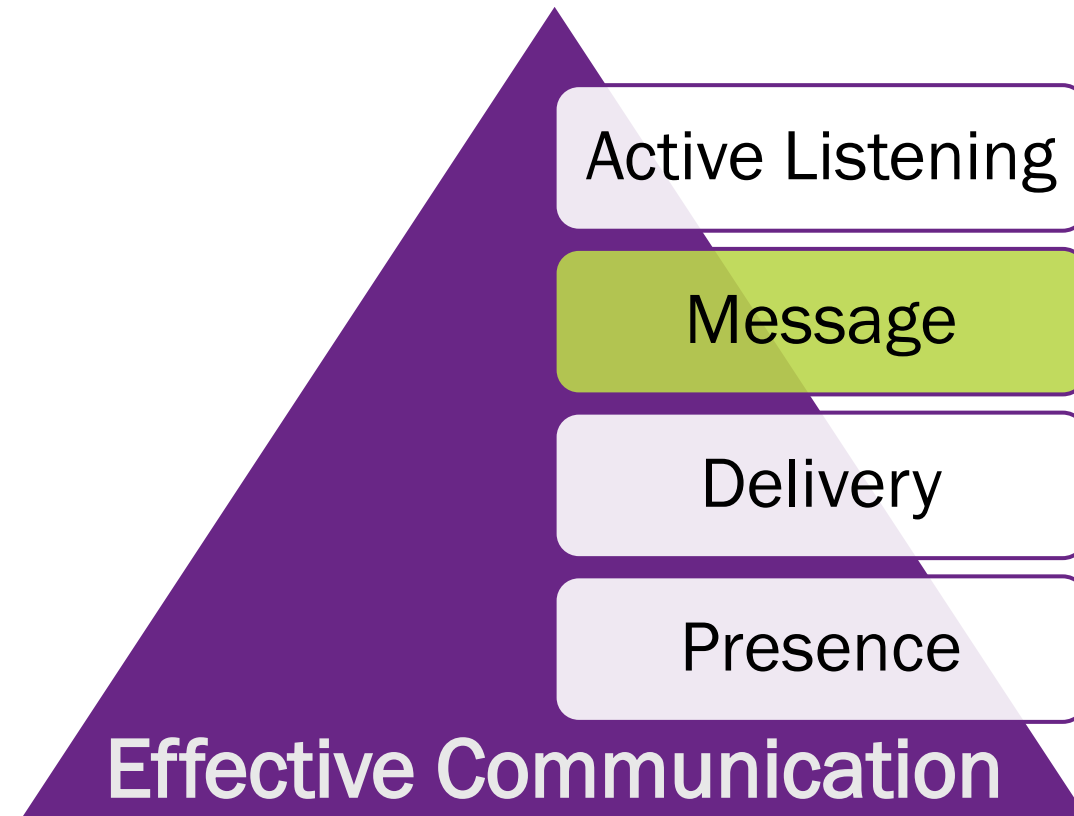
- What level of detail is most helpful?
- When do you need this?

# Practice Active Listening with AI



- Role-play a stakeholder conversation with voice mode
  - Prompt: “Play the role of a skeptical VP of Sales who is frustrated with budget constraints. I’ll present an update. Respond naturally.”
- Ask AI for feedback on your listening and questions
- Repeat with different personality styles

# Effective Communication



Hey Team,

We met with the Tech Ops Leadership Team today and discussed their hesitations on using Maintenix data. The Team provided a few examples while also describing the amount of cleanup they do for when they reference it for planning. It also sounded like only one or two current state models use Maintenix data as they're planning at the engine serial number level.

What I recommend is that we ask Accenture to give us a phased-out rollout plan with this option using Maintenix data. With scenarios to pivot if we need to.

As well as two or three other options for implementation. Option B could be descoping to only capacity model driven opportunities. And option C could be going after the driver-based models that we identified after blueprint which would give us about nine models in total. Or some combination of the three.

@Technology, do you think this is something that we can ask our implementation partner for? Or should we huddle us three first, possibly with Tech Ops Leadership?

Good Morning Team,

### **Situation**

Tech Ops Leadership expressed significant hesitation in leveraging Maintenix data for modeling.

### **Background**

During Friday's discussion, Tech Ops provided examples of substantial data cleanup required before Maintenix can be used for planning.

### **Assessment**

Maintenix is likely to have varying degrees of data readiness, and a single approach would be a high risk on delivery if delays presume.

### **Recommendation / Request for Action**

Request Accenture to provide: A phased rollout plan that incorporates Maintenix data usage with clear checkpoints and pivot options

### **Next Step / Clarification Needed**

Steven — Is this a request you could ask Accenture to bring back to us?

# SBAR Communication Framework

S

Situation

- What is happening now?
- State the current issue concisely.

B

Background

- What led to this situation?
- Provide relevant context to get your audience up to speed.

A

Assessment

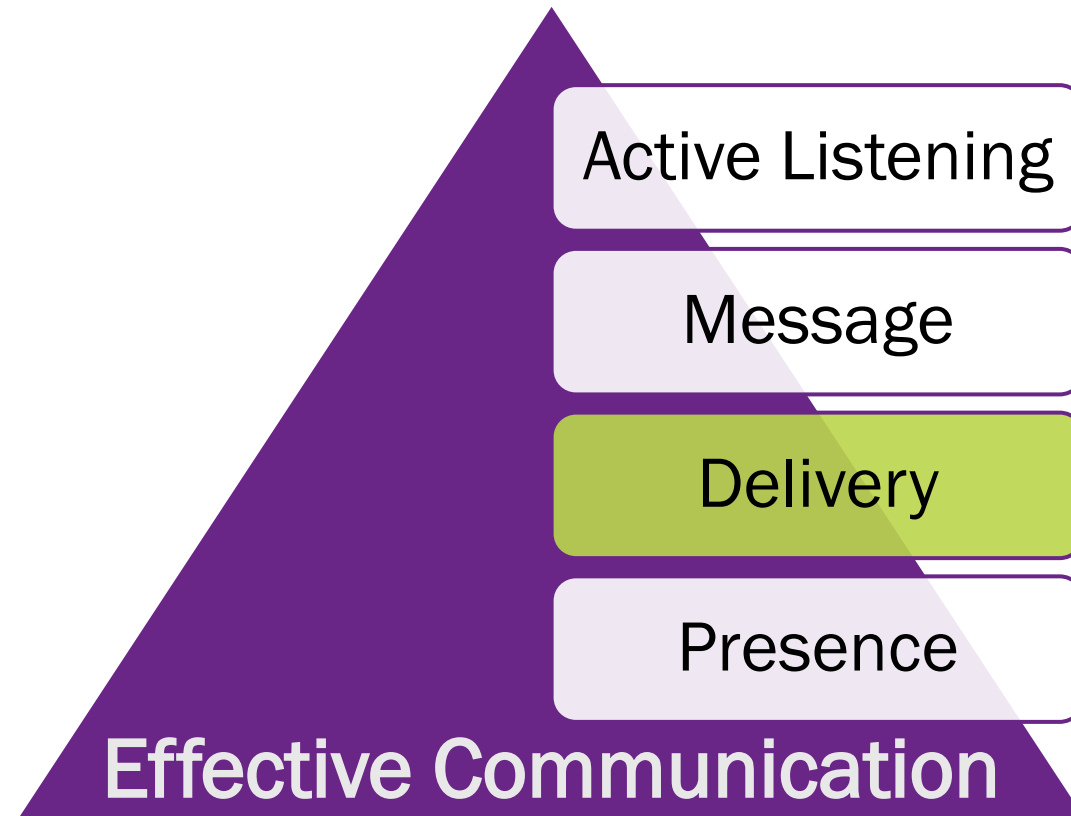
- What is the impact of the issue and potential risks?
- Stick to the facts.

R

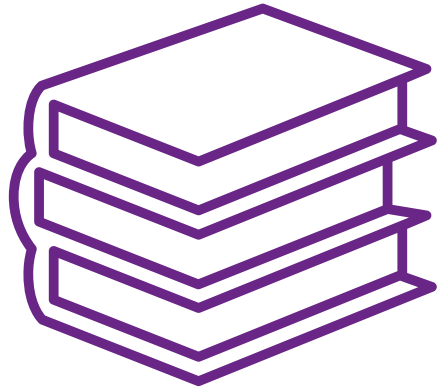
Recommendation

- What should be done next?
- Suggest a clear, actionable strategy to address the problem.

# Effective Communication



# Delivering the Message to the Audience



Financial  
fluency



Mode of  
communication



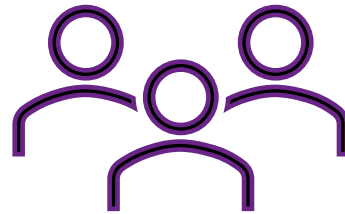
Role

# Which Mode of Communication is Best?



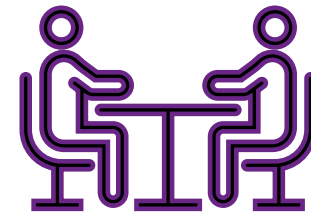
## Email

- Routine updates
- Simple inquiries
- Documentation
- Broad distribution



## Group Meeting

- Collaborative discussion
- Collective decisions
- Cross-functional alignment



## 1:1 Meeting

- Sensitive or complex topics
- Rapport & trust
- Candid feedback

# Tailor Message Delivery Based On Role

## Peer

- Drivers and assumptions
- Logic & mechanics
- Invite challenge

## Operations Manager

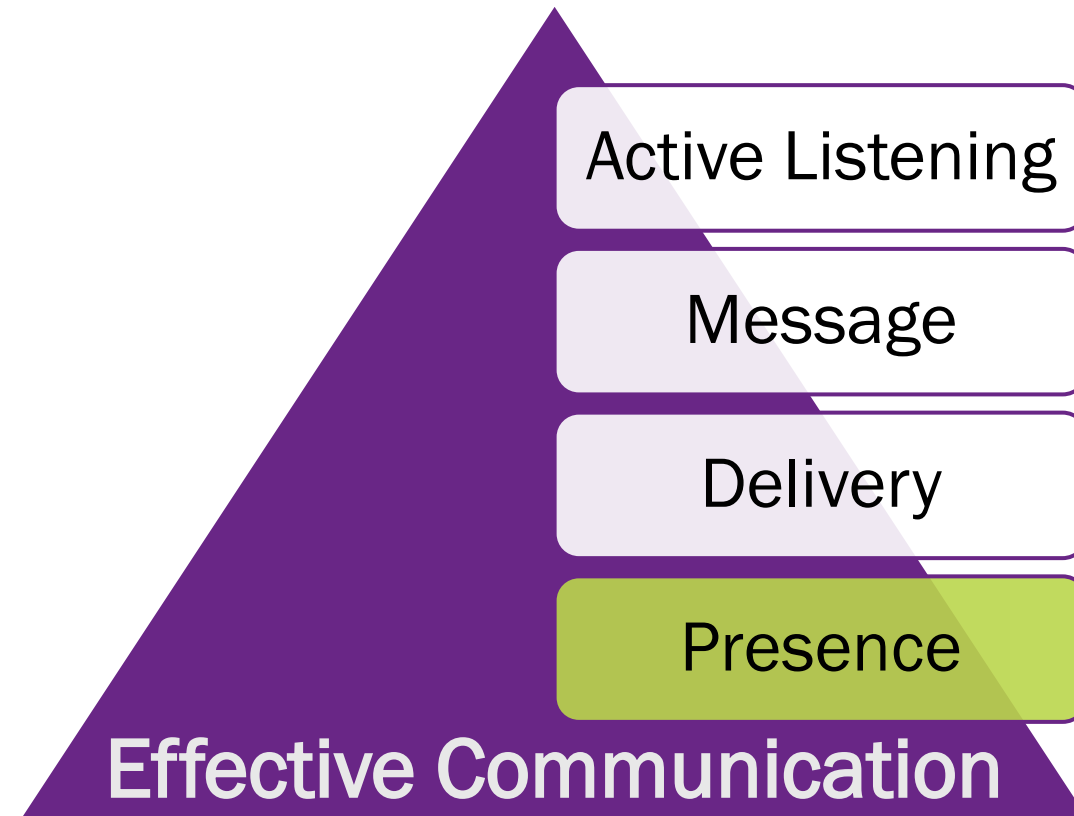
- Impact on their function
- Options
- Tradeoffs and constraints

## Executive

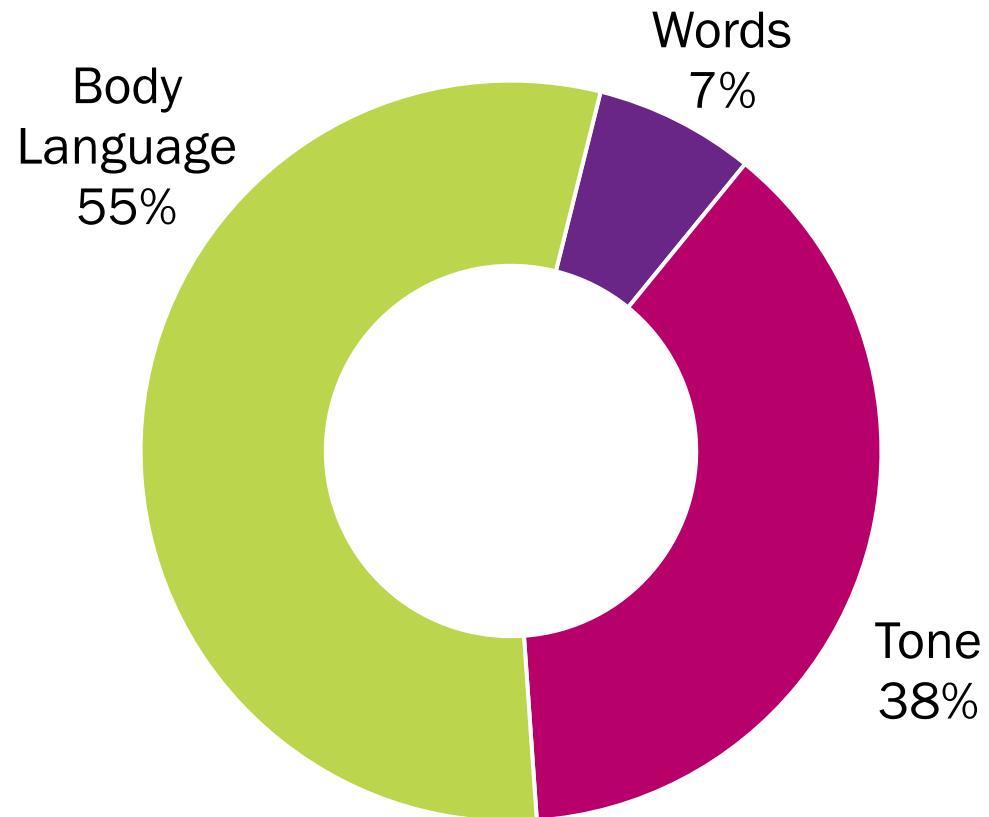
- Bottom Line Up Front (BLUF)
- Strategic implications
- Risks & opportunities

SBAR stays the same. Emphasis changes by role.

# Effective Communication



# Presence Shapes How Messages Land



- Words alone rarely carry the full message
- Presence reinforces credibility and competence

# Presence: Nonverbal Cues

- Posture
- Eye contact
- Gestures
- Facial expressions
- Tone and pacing



# Key Takeaways for Effective Communication

- Technical skills open doors and demonstrate competence
- Competence + character = credibility; credibility fosters trust
- Effective communication includes:
  - Active listening
  - A clear message tailored to the audience
  - Delivering messages with presence

Thank you!

**Speak** with clarity and confidence.

**Lead** with credibility.

**Succeed** by influencing.

# Speaker Bios

# Tyler Vonderheide



**Tyler Vonderheide** is a Senior Manager of FP&A Product Enablement at **Southwest Airlines**, where he partners across Finance and Technology to modernize planning, analytics, and decision support across multiple platforms.

With more than 15 years of experience in FP&A, strategy, and continuous improvement, Tyler focuses on helping finance teams move beyond reporting to influence decisions with clarity and confidence.

As a Lean Six Sigma Master Black Belt, he has led enterprise initiatives delivering over \$85M in value by improving collaboration, removing barriers to success, and enabling actionable insights. Tyler holds an MBA from SMU's Cox School of Business and is passionate about developing FP&A professionals as trusted business partners.

# Rosemary Linden

Rosemary Linden is the Founder and President of Momentum CFO, where she serves as a fractional CFO and FP&A advisor to growth-stage organizations. With over 25 years of experience spanning global Fortune 500 corporations and founder-led businesses, she specializes in building scalable, enterprise-level FP&A capabilities that deliver actionable insight and improved business performance.

Rosemary serves on AFP's North American FP&A Advisory Council and was named CFO of the Year (2025) and a Leader of Influence in Finance & Accounting (2023–2025) by the San Diego Business Journal. She holds an MSBA in Finance & Tax Planning and a BA in Economics.

