



Finance Leadership Exchange

Finance Capabilities Diagnostic: Guide for Improving Performance

Our Research Director will assist in your capabilities assessment efforts using the process map outlined below.

Finance Capabilities Diagnostic Process



The survey can be taken by the individual finance executives and/or the entire finance team.

- Finalize survey participant list based on capabilities assessment goals.
- Select up to three groups within finance for Diagnostic data cuts in addition to the overall report.
- Run survey with support from FLEx Research Director.
- Allow one business week for report generation.

Process
Steps

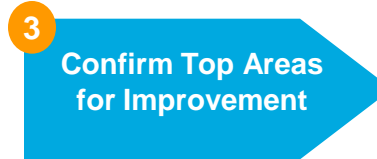
FLEx
Support

Finance Capabilities Diagnostic survey tailored to your company's target constituency.

A FLEx Research Director will walk you through your company's Capabilities Diagnostic results.

- Review how you and your colleagues have rated your organization's finance capabilities.
- Highlight gaps in levels of performance.
- Discuss top areas for capabilities improvement.

Detailed capabilities report highlighting your top areas for improvement.



The Capabilities Diagnostic will identify the top areas for improvement based on low ratings of performance and high ratings of importance. However, these may not be in line with your company's goals.

- Compare top areas for improvement identified in the diagnostic with your company's strategic goals.
- Confirm the areas for improvement that were identified with FLEx Research Director, or propose other areas for focus.

Support from FLEx Research Director to confirm the highest impact areas for your finance team.



Once improvement areas have been confirmed, your FLEx Account Director a FLEx Research Director will work with you to create a plan for support.

- Schedule "kick-off" calls with the FLEx expert in each of your areas for improvement.
- Agree on a plan for FLEx support on each of your areas for improvement.
- Schedule targeted completion dates, and interim follow-up steps.

Customized plan to tackle your highest impact areas for improvement.

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