



AAFCPAs

How to Right-Size Your Finance Function



Who Am I?

- Partner in charge of Managed Accounting Solutions at AAFCPAs
- Experience includes:
 - CPA with Deloitte
 - President of Software Company
 - Non profit boards
 - Public-Company CFO
 - Consultant



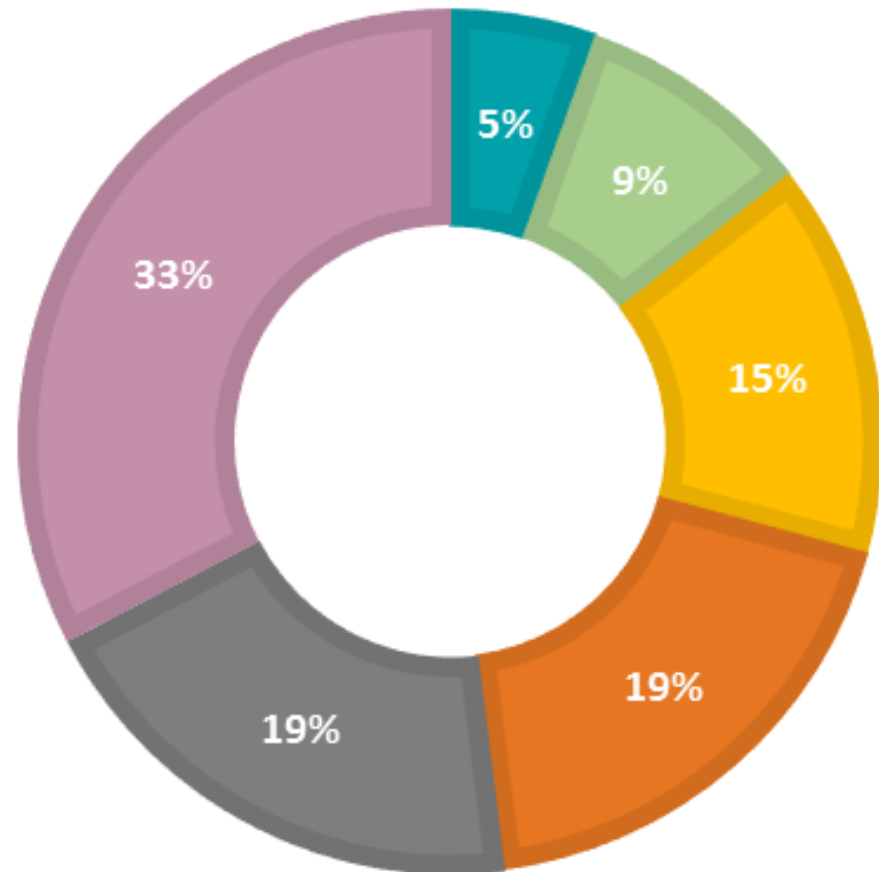
AAFCPAs

2017 Survey Report

“Behind Every Thriving Organization is a High Functioning CFO”

Over 33% state HR limitations and bandwidth is a primary challenge

- Regulatory issues
- IT performance issues
- Lack of collaboration with operations & sales functions
- Budget constraints
- Lack of meaningful metrics
- Human resource limitations/team bandwidth

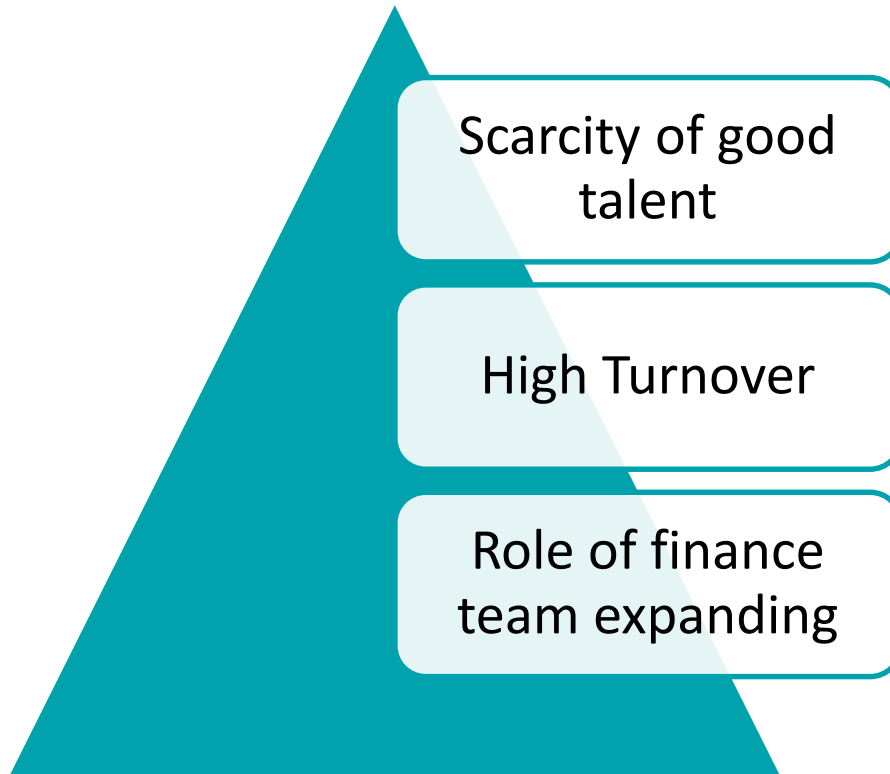


What Does It Mean to “Right-Size”

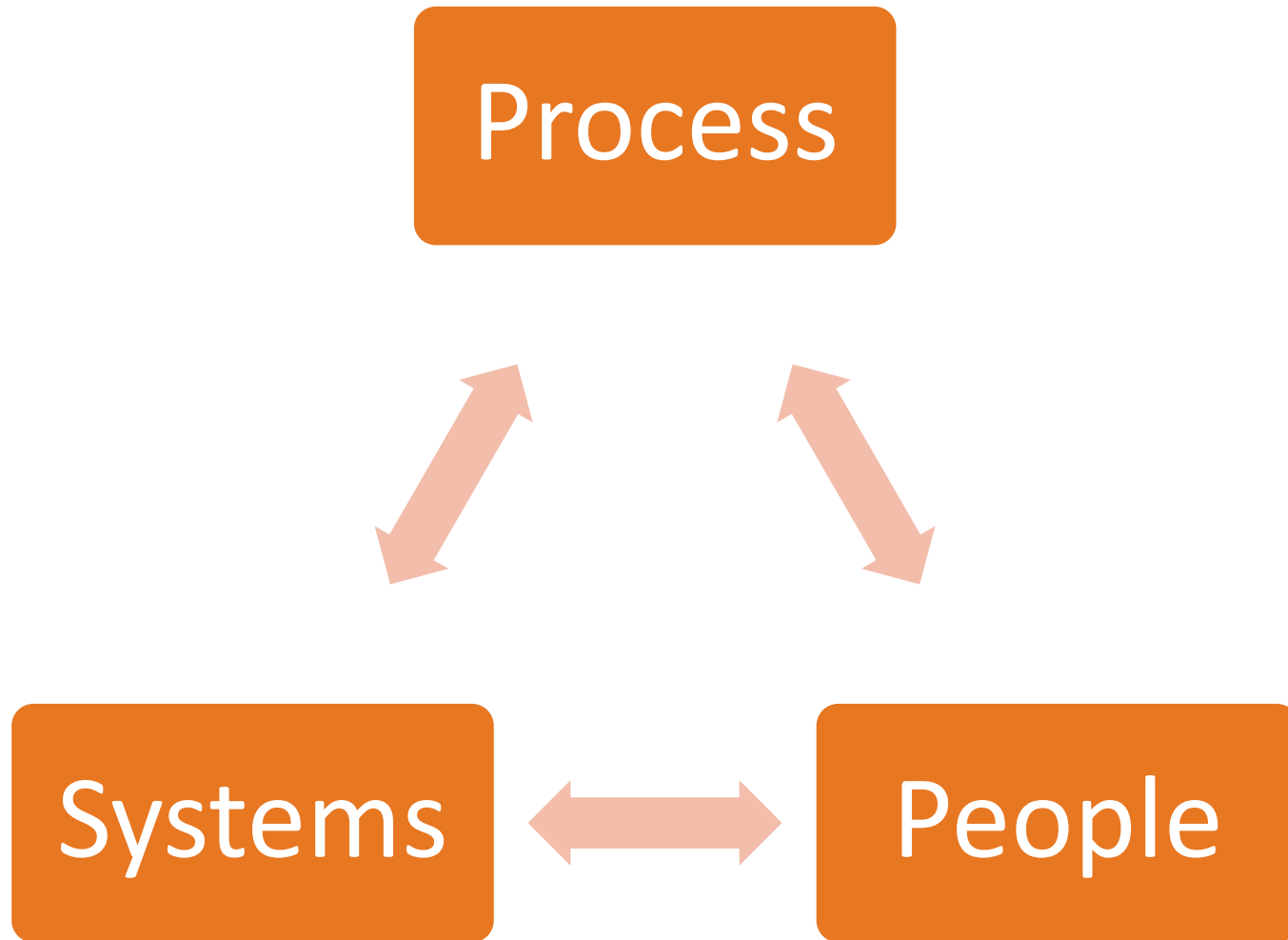
Rightsizing is proactive and should be an ongoing part of managing an organization.

- RIGHT skillset to meet primary challenges and strategic initiatives
- RIGHT knowledge to mitigate “pain points”
- RIGHT cost to organization

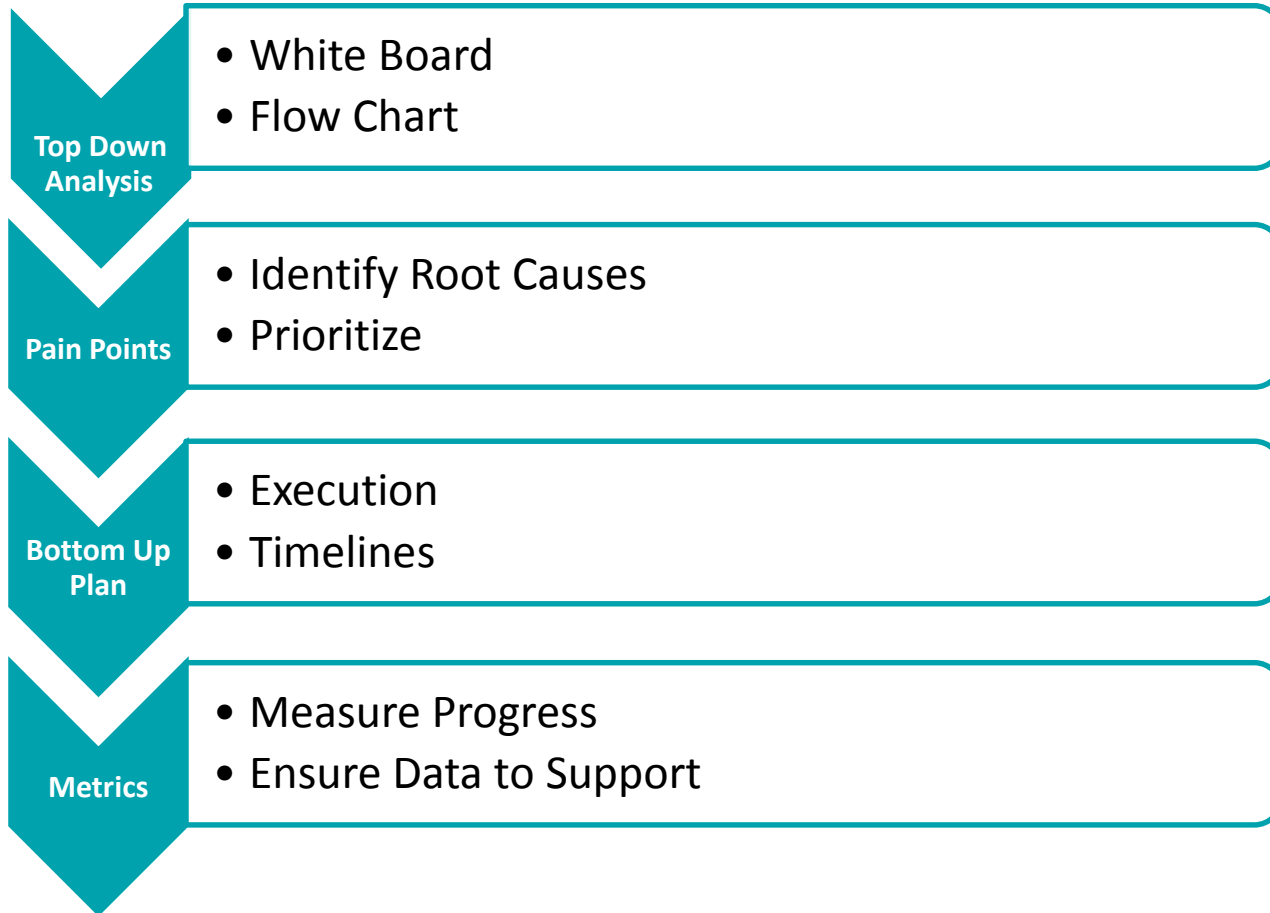
Why An Important Topic Now?



How Do We Assess Our Needs?



Process



Systems

Efficiencies

Complete

Useable

Valid

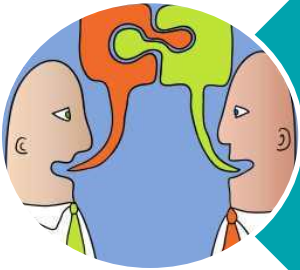
Timely

Accurate

People



Who should we hire to meet our challenges?



How do we keep them engaged and relevant?



What should we do to retain them?

Conclusion

- Continue to evaluate for relevancy
- Right-size
- Between MAS, BITA, and other AAFCPAs divisions, happy to help in any way we can

Questions & Comments



Janice O'Reilly
Partner
AAFCPAs



774.512.9046
joreilly@aafcpa.com