

CFO Program:

# Leading the Finance Function of the Future



Welcome to

# CFO Program: Leading the Finance Function of the Future

Earn 37 PD Hours

Explore the technical, ethical and interpersonal skills needed to stay agile and adapt to change.

C-suite executives are relying on their finance leaders during these times of unprecedented change in digital technologies and changing workforce trends. It is increasingly important for organizations to operate at peak levels of performance to succeed. Participants will explore the technical, ethical and interpersonal skills they need to master and sustain change, and help their organizations stay agile and more easily adapt to change.

This program fosters a high energy, interactive learning environment. Activities consist of a combination of cases, exercises, tool kits, lively discussions, as well as networking and sharing experiences. Your active participation will be required throughout the program. Come prepared for a unique experience that will move you towards realizing your full CFO potential. Allow us to guide you on your journey.

- Learn through interactive activities and collaborate on cases, exercises, discussions, while networking with peers.
- Explore the role of CEOs and CFOs as change leaders and the importance of your personal brand.
- Gain an understanding of best practices for enabling the finance team to maximize its impact and improve strategic initiatives.

## Delivery Methods:

In Person Instructor Led  
Learning

Virtual Instructor Led  
Learning

# Key Takeaways

## By the end of this course, participants will be able to:

- Explain the roles of CEOs and CFOs as change leaders and outline the required competencies for these roles.
- Explain what a personal brand is and outline best practices for communicating your personal brand.
- Explain how stakeholder analysis and mapping can be used to improve relationship management with stakeholders.
- Outline best practices for enabling the finance team to maximize its business impact and improve an organization's strategic initiatives and decision making.
- List the barriers many organizations face in leveraging data for more informed decision making and practical steps you can take to remove those barriers.
- Outline the CPA Code of Professional Conduct and describe best practices for complying with the code.

## Who Will Benefit

This program is designed for aspiring, new and experienced CFOs focused on the continued development of specific in-demand skills and competencies required to lead from the top.

## Earn a Digital Badge



Our new collection of digital badges can be earned through the completion of any of our certificate programs offered in our professional development catalogue. Collect these digital badges to add to your website, social profiles, email signature and more. These badges are an easy way to visually communicate your skills and accomplishments to your peers and network. Digital badges will be awarded based on course completion requirements.

# Certificate Outline

Please note session topic distribution may change depending on course delivery method.

## Session 1

### Program Introduction & Where Are You On Your CFO Journey?

- Introduction & Topics of Discussion
- CFO of the Future is Now
- What CEOs & CFOs Need to Know About Generative AI?
- What is an 80/20 CFO?

## Session 2

### What CEO's/Boards Want From Their CFOs & Strategic Planning

- CFO as a Co-Pilot/Wingman
- CFO Differentiators
- Career Progression CFO to CEO
- Going on a Finance Transformation Journey vs. Implementation Journey
- The Future of the CPA Profession & the role of Analytics Translator
- How Strategy Really Works
- Strategic Finance 101
- Becoming The Chief Future Officer

## Session 3

### Boards & Stakeholder Analysis

- Governance Principles
- Issues Facing Boards
- ESG
- The CFO's Role in ESG
- How CFOs support the board
- From Number Cruncher to Storyteller
- CFOs Serving on Boards
- Stakeholder Mapping
- Relationship Building

#### Session 4

### Mindsets and Beliefs: Becoming a Meaning-Maker in a Volatile World

- Becoming Value-Centric: Four Skills CFOs need to Evolve
- Strategic Leadership: Adding Value as a CVO
- Extreme Ownership as a CFO: Profit, Planet, People
- CFO Leadership
- Leadership Assessment “speed dating”
- CFOs Talking: Small Group & Large Group Discussions

#### Session 5

### Risk Management and Ethics

- Risk Management Principles
- Risk Categories
- Organizational Transformation and Risk Management
- Oversight of Ethics
- Ethical Vignettes

#### Session 6

### Human Workforce Strategies

- Worker empowerment: People are becoming their own bosses
- Why are employees quitting their jobs?
- EVP: Employee Value Proposition
- The AI Talent Guide (Article by Gartner)
- What's Next?

## Attendance Requirements

To earn your CPD hours and Digital Badge you must attend **all live sessions**. We understand that sometimes unplanned absences happen. Please reach out to our [Operations Team](#) if you're unable to attend a session as scheduled.



#### ABOUT YOUR INSTRUCTOR

### **Barbara A. Palmegiani**

**Barbara A. Palmegiani**, B. Comm., FCPA, FCMA is a highly accomplished financial professional, management consultant, educator in credit management and accounting courses at the B. Comm. and MBA levels, and a top-rated instructor for the CPA Program as well as CPA Professional Development and corporate in-house training programs. Barbara spent 17 years in progressive senior-level positions in several large public organizations as well as more entrepreneurial private companies, most recently as a member of the executive team as Vice-President of Finance and CFO, and has extensive experience working with Board of Directors. Her senior financial management experience has provided her with extensive insight and understanding of the value of the finance function.



## ABOUT YOUR INSTRUCTOR **Marie Campagna**

**Marie Campagna**, FCPA, FCMA has over 40 years of progressive experience in the public and private sectors, has driven a strong track record of results, execution excellence, and improved operational efficiency while supporting patient care/client needs and the values of the organization. Her career has been rooted in finance and operational support and spanned many sectors including healthcare, automotive, logistics and pharmaceuticals. In her various CFO and VP finance roles, Marie provided strategic leadership to Finance, Contract Management, Procurement, Information Technology, Strategy & Planning, Research, New Business Development, Risk Management, Facilities and Hospitality Services. Marie holds a CPA (CMA) designation, a Masters in Business Administration from the University of Windsor, and is a Fellow and life member of the Chartered Professional Accountants of Ontario.

**Need Approval  
to Attend?**

If you need approval to attend the session, please fill out the [Employer Request Letter](#).

## Have Questions? Speak to an Advisor.

To speak to one of our advisors, please fill out this [form](#).