Future-Proofing Your Organization in an Uncertain World
Finance Transformation
Strategies to Scale for the Future

Opportunity
Today’s Speaker

Ryan Prindiville
Director of Strategy & Transformation
@ Armanino LLP

• Specializes in providing management consulting, assessments, and roadmaps for growing businesses
• 20 years of multi-functional experience including strategy, technology, product commercialization, innovation, operations, solution delivery, process improvement, and management consulting roles
Today’s Speakers

Brian Kinion  
Audit Committee Chair, Board of Directors, Marin Software & Former CFO, Marketo

- More than 25 years of leading finance in public and private companies during periods of rapid growth and cash constraints, including 3 IPOs.
- Thought leader in leveraging technology/systems and process to effect change and scaling organizations during periods of high growth.
- Past responsibilities included global financial reporting and compliance, financial planning and analysis, investor relations, and driving continuous process and system improvements to support the company’s growing operations.
Michael Shultz  
Former Manager of Financial Reporting

- Nearly 20 years of accounting experience in auditing (Big 4), consulting, and financial reporting management to guide companies on their path to Modern Finance.
- Focus on the modernization of the finance function and the “new” accounting profession – as the finance organization is increasingly being asked to do more but without the headcount to match.
- Understands the need to have existing technologies work with new technologies to automate mundane tasks and create new exceptional accounting teams.
Priorities: Yesterday vs. Tomorrow

Yesterday:
1. Efficient Accounting Operations
2. Accurate Financial Statements
3. Enforce Strong Controls
4. Clean Audit

Tomorrow:
1. Catalyst for change and strategic advisor to the business
2. Strong business partnership
3. Data-driven insights to support business decisions
4. Robotic Process Automation (RPA)
5. Process improvement
Trends

• Transformation: Real or just talk?
• Factors driving the change for CFOs?
• How is this materializing on the ground?
Putting it Together

• Key actions to do today to drive finance transformation rather than be driven

• Specific recommendations to be proactive rather than reactive
Key Takeaways

• Be proactive. Don’t wait for an approved budget. Have a long-term plan. But start NOW.
• Have a growth mindset and embrace change
• Use technology/systems and process to scale
• Engage with business and IT leaders, external partners to set up cadence to drive your journey aligned to priorities
• Transformation required to attract / retain best employees
• Transforming your team is the future but is also NOW
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