



CFO SUCCESS

A Guided Tour to
CFO Success

FEI San Francisco Bay Area Dinner

November 20, 2014

SAMUEL DERGEL

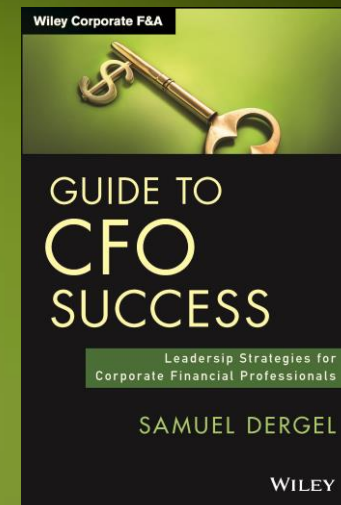
SAMUEL DERGEL

/ PROFILE

Samuel is a widely respected executive recruiter, coach and consultant coach. He works with Stanton Chase International, ranked within the top 10 global retained executive search firms. As a key member of the firm's CFO and Financial Executives practice, Samuel works with his colleagues nationally and around the world to advise, attract, assess and aid organizations in the acquisition of exceptional CFOs and building strong finance teams.

Samuel is an active CPA (in the USA and Canada), Chartered Accountant, a Certified Personnel Consultant, and is a graduate of McGill University. Samuel is widely known as "The CFO Expert" and is an active blogger, social media leader and speaker on the topic of the role of the Chief Financial Officer.

Samuel's recent book, *Guide to CFO Success: Leadership Strategies for Corporate Financial Professionals*, published by Wiley & Sons, is available wherever books and e-books are sold.



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Hashtag: #CFOSuccess

DISCUSSION TODAY

/ Agenda

Some CFOs are more successful than others.

- What makes a CFO successful?
- What changes can you make that will improve your personal career success?
- How can you be the best CFO for your current employer as well as your next one?



WHAT MAKES A CFO SUCCESSFUL?

WHAT MAKES A CFO SUCCESSFUL?

/ 4 POINTS

Being part of a successful company (or story)

Making a difference

Being known on the outside

Relationships

Being part of a successful company

/ or story

Everyone loves a winner

Success attracts success

Making a difference

/

Being recognized internally

Making decisions

Being a leader among leaders

Being known on the outside

/

Today's successful CFO is visible, inside & outside the organization

Visibility is hard work

What are you doing to be visible?

What do you need to improve on to be a better outside facing CFO?

Relationships

/

What is more important?

- IQ
- EQ

CFO Relationship Map

CFO Relationship Map

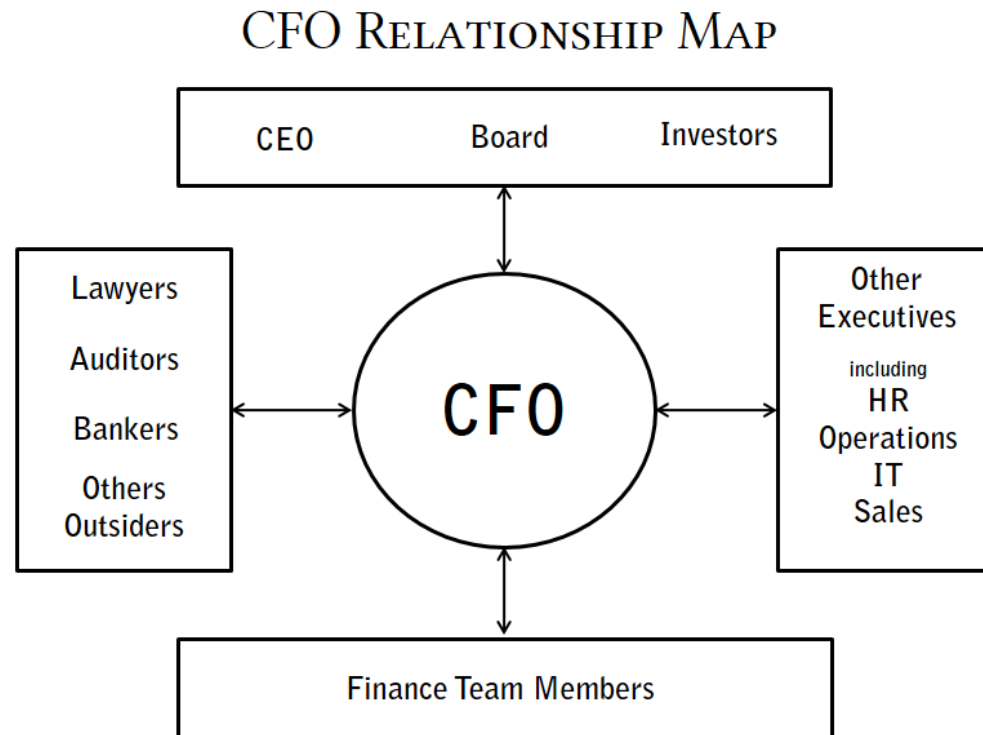


Figure 8.1 - [Guide to CFO Success: Leadership Strategies for Corporate Financial Professionals](#)

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CHANGES YOU CAN MAKE TO IMPROVE YOUR SUCCESS

What can you do?

/

Changes you can make

- Plan for your success
- Steps you need to take



PLAN FOR YOUR SUCCESS

/ to be more successful

How to plan for success

/

How to get there
Wing it

Plan



% of Failure

% of Success

Success requires focus on
Employer
AND
Career

Personal challenge

How to plan for success

/ continued

Yet, in my experience...

The THING TO REMEMBER is...

Planning

- You know how to plan, but
- Can you properly plan for yourself?

Be honest with yourself

- Mentor
- Coach



STEPS YOU NEED TO TAKE

/ to be more successful

Steps you need to take

/ to be more successful .1

How successful are you, really?

Branding exercises sure help

Read: *The Power of Personal Branding for Career Success*, Karen Wensley, CPA Canada, 2012

Steps you need to take

/ to be more successful .2

Assessment - Have you done one?

This is what I use for my Strong CFO Program

Read: *Strengths Based Leadership: Great Leaders, Teams, and Why People Follow*, Tom Rath & Barrie Conchie, Gallup Press, 2009

Go ahead: Read my personal Strengthsfinders assessment

Steps you need to take

/ to be more successful .3

Know what you need to do

Plan to get it done

Stay on track

Keep yourself on track

OR

Get help



BEING THE BEST CFO FOR YOUR CURRENT AND FUTURE EMPLOYER

/



NEVER LOOK FOR ANOTHER JOB AGAIN

/

Ideal State

/.1

Never be a CFO in Transition.

In this state you have

Developed your Brand

Have visibility

An excellent Network

Ideal State

/ .2

Being a “Great CFO” does not make you a “Great CFO In Transition”

Can only do this if you focus on your Career AND your Employer

Catching up from behind

/.1

Outplacement Services

Action Plan should identify

- What your next role should look like

- Your daily schedule

- Track your contacts and follow up

- Targets and metrics

Catching up from behind

/ .2

Time Wasters
Resume
LinkedIn
Recruiters

Focus on

/

Branding

Visibility

Networking

Accepting your next CFO role

/

Fit

Location

Due diligence

Multiple opportunities

Gut check



/ QUOTE

YOUR SUCCESS IS MY SUCCESS

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