

# Finance Partnering the Business

## One-Day Workshop



### Summary

Increasingly Finance functions are looking to develop approaches, structures and roles that effectively align the function to the organisational strategy and goals, effectively utilising resources and adding value. The term 'Finance Business Partnering' is used generically to describe this approach.

This workshop is aimed at Finance Directors, Heads of Finance, Finance Managers and Business Partners who are looking to raise their understanding of this approach and develop strategies to enhance how Finance effectively 'partners the Business'. It provides external research, tools and frameworks and practical advice on how to review Finance effectiveness and take the Finance function to the next level.

Available as a one-day seminar or workshop, it can be adapted to the needs of the specific Finance team and organisation.

### Contents will include:

- Drivers and definitions of Finance Business Partnering
- External views – typical approaches, roles, competencies
- Lessons learned
- Readiness health check – “How are we doing?”
- Strategic drivers and implications for Finance
- The vision for Finance – “What will there be less of, and more of, in the future?”
- Measuring partnering effectiveness and added value
- Marketing Finance with own staff and the business
- Engaging and developing the finance community
- Action plans – for the next level

### This workshop will enable you to:

- Establish a clear definition of what we mean by Finance Business Partnering and specifically for Finance in your organisation
- Explore some typical models of how Finance connects to the business and the pros and cons of the different options
- Define key roles, responsibilities and competencies
- Review the top ten lessons learned from research into organisations taking this approach and how they apply to your Finance function
- Give your Finance function a 'readiness health check' to assess current progress against key success criteria for effective Finance Business Partnering
- Identify the key strategic drivers of the organisation and the implications for Finance
- Create a simple vision for Finance that will engage Finance staff and business customers
- Review how to measure 'partnering effectiveness' within Finance
- Identify ways to effectively promote the function both internally and with business customers
- Develop strategies to involve and engage the Finance community in a business partnering approach
- Create an outline plan of how to take your own Finance function or area to the next level

### Workshop Details

This workshop is run in-house for clients and can either be 'off-the-shelf' or designed as a bespoke workshop. It works well for Finance Management teams and whole groups where their specific functional area and relationships can be explored. Options in-house include guest speakers from other organisations. For an informal discussion please call Judith Strange on +44(0)7866 676230 or email [judith.strange@develop.uk.com](mailto:judith.strange@develop.uk.com).

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**The Specialists in Business Partnering**