

CFO Accelerator: Value Creation Workshop

Program Description: An advanced, hands-on workshop for CFOs focused on four levers of value creation: accelerating organic growth, guiding business-model shifts to recurring revenue, running data-driven cost transformations, and executing buy-and-build strategies. Through cases and practical tools, participants will pressure-test growth levers (pricing, churn, sales productivity), apply SaaS metrics (ARR, NRR, Rule of 40) where relevant, and build a CFO playbook that balances near-term margin with long-term scalability. We also cover integration governance, synergy realization, and working-capital discipline to sustain value creation and exit readiness. Attendees leave with decision frameworks, dashboards, and prioritization methods they can use immediately with GTM and operating teams.

Program Date: Wednesday, November 12, 2025

Program Time: 8:15 AM – 6:00 PM ET

Program Location: Insight Partners, 1114 6th Ave, New York, NY 10036

Program Level: Advanced

Prerequisites / Experience: By invitation only; attendance is limited to invited Chief Financial Officers of Insight Partners Portfolio Companies.

Estimated CPE Credit: 7

Delivery Method: Group Live

Field of Study: Business Management & Organization

Note: Participants must be present for at least 50 minutes of the content portion of the program to earn credit for that hour.

CPE Program Sponsor: FTI Consulting Global Talent Development,
talent_development@fticonsulting.com

LEARNING OBJECTIVES

By the end of the session, participants will be able to:

✓ Organic Growth Acceleration

- Understand your role in enabling top-line growth levers (e.g., salesforce productivity, churn reduction, pricing discipline).
- Analyze trade-offs between near-term revenue pressures and sustainable growth strategies.
- Evaluate the Return On Investment of different growth levers (Customer Acquisition Costs, Net Revenue Retention, pricing uplift) to prioritize investments.
- Design a CFO-driven framework for tracking and reporting growth performance across GTM functions.

✓ Business Model Transformation

- Understand the financial implications of shifting from transactional to recurring revenue (e.g., Annual Recurring Revenue, churn, Rule of 40).
- Apply SaaS metrics to real-world transformation challenges.
- Evaluate the impact of pricing models, GTM agility, and customer profitability on transformation success.
- Create a CFO playbook for balancing short-term margin pressure with long-term business model scalability.

✓ Operational & Cost Optimization (Turnaround & Efficiency)

- Understand the financial implications of shifting from transactional to recurring revenue (e.g., Annual Recurring Revenue, churn, Rule of 40).
- Apply SaaS metrics to real-world transformation challenges.
- Evaluate the impact of pricing models, GTM agility, and customer profitability on transformation success.
- Create a CFO playbook for balancing short-term margin pressure with long-term business model scalability.

✓ Buy & Build (Platform Roll-Up Strategy)

- Understand the CFO's role in driving synergy realization (cost, revenue, operating model).
- Analyze financial levers across the M&A lifecycle (integration pacing, working capital, TSA exits).
- Evaluate risks of over-emphasizing short-term EBITDA vs. long-term platform scalability.
- Design a CFO-led integration governance approach to sustain value creation and exit readiness.

ABOUT THE PROGRAM SPONSOR (FTI CONSULTING)

FTI Consulting is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have the final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

ABOUT THE CFO PROGRAM BY INSIGHT PARTNERS

Designed to build a collaborative, high-impact, learning community, this 12-month program equips CFOs from our portfolio companies with the tools, insights, and relationships necessary to drive outsized enterprise value and long-term success.

This program is designed for a cohort of fewer than 15 participants, with subgroups to foster connection, discussion, and shared learning. Workshops and group presentations are at the heart of the experience, and each person's voice truly matters.

Your presence brings unique value—not just to your own experience, but to the richness of the group. We kindly ask you to join every session in person so we can all learn, grow, and build together.

The program's quarterly meetings take place in at the Insight Partners NYC Office on November 12, 2025; February 11, 2026; May 12, 2026; and September 16, 2026.