

Technical Excellence for Finance Leaders

Program Description: A technical, practitioner-led workshop designed to help CFOs and senior finance leaders build durable, decision-grade finance capabilities across data foundations, operating model forecasting, strategic reporting, transformation execution, and AI enablement. Using a SaaS-oriented case study, participants will define value-driving KPIs and initiatives, map metrics to data and systems (e.g., customer cube and key GTM tools), translate operational drivers into a driver-based three-statement forecast and free cash flow bridge, and produce board-ready reporting and narratives aligned to value creation and exit readiness. The session emphasizes hands-on exercises, peer critique, and practical artifacts participants can adapt in their own organizations.

Program Date: Wednesday, February 11, 2026

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 limited to invited CFOs / finance leaders within the Insight Partners CFO Program.

Estimated CPE Credit: 7.50 CPE Credits

Instructional Delivery Method: Group Live

CPE Field of Study: Finance

Advanced Preparation: None

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:

✓ Data & System Foundations

- Define value creation initiatives and the KPIs that matter at the management level; build a KPI tree that cascades into operational teams.
- Diagnose key data challenges and systems gaps; specify interim data workarounds vs. long-term platform investments.
- Outline a phased data infrastructure roadmap (e.g., customer cube, entity resolution, system synchronization) tied to reporting and operational use-cases.

✓ Operating Model & Free Cash Flow

- Translate KPIs into a driver-based three-statement forecast that connects operational levers to financial statements and the deal model.
- Bridge EBITDA to free cash flow, identifying key cash levers, working capital dynamics, and scenario sensitivities.
- Communicate operating risks and covenant / liquidity implications in a concise, board-appropriate manner.

✓ Strategic Reporting

- Design dashboards and reporting outputs that surface the right insights (management vs. board vs. external reporting) and support the equity narrative.
- Evaluate dashboard quality (signal vs. noise) and define a practical cadence for KPI tracking and value creation initiative reporting.

✓ AI in Finance

- Identify high-value AI use cases in finance and the enablers required (data, systems, governance, and talent).
- Assess execution considerations, including build vs. buy tradeoffs and risk controls for responsible deployment.

✓ Transformation Leadership

- Establish CFO ownership for data, reporting, and change management; quantify impact and align stakeholders on priorities.
- Partner with the C-suite to drive enterprise strategy through finance and communicate change across the organization.

ABOUT THE PROGRAM SPONSOR (FTI CONSULTING)

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THE INSIGHT CFO PROGRAM

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 ask you to attend every session so we can all learn, grow, and build together.