

CFOs & Controllers Scorecard

Check the box that best describes the individual EXAMPLE

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Historical / Controller	1	2	3	4	Forward-thinking / CFO

PERSONAL TENDENCIES & MIND-SET

1	Superman / Wonder Woman	_____	xx	_____	_____	Team-Oriented
2	Task-oriented / checklists	xx	_____	_____	_____	Process (workflow) oriented
3	Averse to change	_____	xx	_____	_____	Helps prepare for / drives change
4	Office full of paper / cluttered	xx	_____	_____	_____	Organized / under control
5	Works on improving technical skills	_____	_____	xx	_____	Works on improving analytic skills
6	Hurried / lots of deadlines	xx	_____	_____	_____	Ready ahead of time
7	Seeks exactness at all costs	_____	_____	xx	_____	Understands when estimates are fine
8	Produces & likes lots of DATA	xx	_____	_____	_____	Presents only INFORMATION

DUTIES & RESPONSIBILITIES FOCUS

9	Primarily Chief Accounting Officer	_____	xx	_____	_____	Co-pilot to CEO & Board
10	Defender of the Fort	xx	_____	_____	_____	Facilitator of better practices
11	More reports are good	_____	xx	_____	_____	Less reports are good
12	More targets, controls, measures	xx	_____	_____	_____	Fewer targets, controls, measurements
13	Control by budgeting	xx	_____	_____	_____	Improve by forecast / modeling
14	Measures for accountability	_____	xx	_____	_____	Measurements to learn & improve
15	Compliance oriented	_____	xx	_____	_____	Creative / idea-generator

IMPACTING OUTCOMES FOCUS

16	Automate everything	xx	_____	_____	_____	Eliminate / then automate
17	Top Down (command & control)	_____	xx	_____	_____	Bottom-up mindset / help mgrs learn
18	Hangs with admin colleagues	xx	_____	_____	_____	Works closely with sales & oper teams
19	Keeps score well/ accurate stmts	xx	_____	_____	_____	Leverages CFO role to improve results
20	Finance & acctg as a cost center	_____	xx	_____	_____	Finance & acctg as a profit center

	10	8	2	0	
Total # of scores per column	10	8	2	0	Scoring
Times the value of each score	x 1	x 2	x 3	x 4	
Total score per column	10	16	6	0	
Total 4 colums =	32				1.0-1.5: Accounting Mgr / Controller
Divide total by 20	20				1.6-2.5: Controller w/some CFO duties
Average Score =	1.6				2.6-3.5: Strong CFO / all-star potential
					3.6-4.0: All-star / in rare air