

**DEFINING WHAT WE WANT IN OUR CFO:
RANKING & GROUPINGS: EXPERIENCE, COMPETENCIES, CHARACTERISTICS AND FIT
BASED ON OUR MAY 1, 20XX MEETING**

Four targeted areas important to selecting the next CFO of Organization:

- I. Targeted Experience Candidate Brings to Organization**
- II. Targeted Skills and Competencies Candidate Can Describe**
- III. Targeted Characteristics, Character and Mindsets Tapped by Behaviorally-Anchored Interview Questions.**
- IV. Required Fit with the Organization Culture Tapped by Interview Questions**

Questions to ask for each section are:

- Which of these factors are most critical for the success of the enterprise?
- Which are hardest to get and are worth making trade-offs for?
- Which are most critical for this stage of the business?
- Were this person to stay only 18 months, which of these factors would make the most positive difference?
- What has been left off that is essential or critical?

Targeted Experience CFO Candidate Brings to Organization

Operating Experience with Federal Government IT Services Firms
Federal IT Contract Services Experience and Experience with DCAA are top priority

Knows Corporate Finance Processes and Procedures that we will grow in to but has worked with Organization-Size Firms to know that too much too soon won't work

Experienced with or motivated to learn to:
Work with Lawyers (e.g., on M&A)
Work with Banks (e.g., on loans and lines, cash management, covenants, etc.)

Working in a Diverse Environment

Other:

II. CFO Candidate Targeted Skills and Competencies

Priority Codes:	Pink:	Highest Priority
	Orange:	High Priority
	Yellow:	Important
	Blue:	<i>Important, but Lower Priority</i>

Targeted Skills and Competencies for CFO

General (see next pages)

Management
Delegation
Strategy
Planner, Visionary
Communication: Listening, Presenting, Acts as Spokesperson
Organizing Financials and Business Information
Mentoring and Coaching
Relationship Building
Leadership: Motivates and Develops Staff; Mentors

Specific (Candidate's Strengths and Comfort Level in Each Area)

(Seeking Candidate with Extraordinary Competence in at least 2 Key Areas)

Area 1: Highest Priority

Accounting & Finance (A/R, A/P, G/L, Income Statement, Balance Sheet, etc.)
Management & Control (collect, consolidate, track, and report monthly projections and performance relative to plan, etc.)
Annual Planning & Budgeting
Cash Flow
Capital Planning
Analysis (ROI, Business Cases, financial forensics, etc.)

Area 2: High Priority

Contracts & Pricing
Teaming Agreements
NDAs
Schedules

Area 3: Important Priority (tie)

Mergers & Acquisitions
Investors
Legal
NPV Analysis

Area 3: Important Priority (tie)

Treasury (cash management, loans & lines)
Bank Functions (Covenants, Terms, Financing)
Balance Sheet

III. CFO Candidate Targeted Characteristics, Character and Mindsets

This section shows both an operational description of each characteristic and a brief caption for the characteristic.

Each operational description suggests questions that tap into the candidate characteristic we want the candidate to tell us more about it.

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Operational Description Characteristic

1. Organizational Thinker and Builder (Orange: High Priority, Yellow Moderate Priority)	
Distills Key Points in Focus Areas Where Time is Spent	Sees Patterns, Priorities
Takes Pride in Quality Standards, Excellence	High Achievement Need
Consolidates and Institutionalizes Insights/Lessons Learned	Org. Wisdom Builder
Understands How Parts Contribute/Fit Bigger Picture	Sees Part/Whole Gestalt
Asks the Right Questions	Curious/Investigative
Grounded in Reality	Feet on Ground Realist
Holds Entrepreneurial Mindset (Ownership Model)	Ownership
Uses Intelligence to Benefit Business	Contributor
Doesn't Take Things at Face Value	Challenges the Model

2. Maturity in Interpersonal Dynamics and Relationships with Others	
Seeks, Respects and Welcomes Input from Others	Open to Other's Views
Thinks Independently with Constructive Pushback	Independence
Refrains from Power Jousting with Peers/Staff	Uses Power Constructively
Develops Interdependent Relationships with other Strong Players	Identity as Strong Player
Knows When to Ask for Help from Stakeholders	Fills Knowledge Gaps

3. Willingness to Do Whatever Needs to Be Done and Ability to Get It Done	
Energetic/Can Do Participant	Energetic
Willing to Do Whatever Needs to be Done	Rolls up Sleeves to Do It
Sees What Needs to Be Done, Then Takes Initiative to Get it Done	Self Starter and Finisher
Easily Adaptable to Our Approaches	Adaptable/Non Rigid
Makes Ideas Operational, Then Implements Them	Moves Ideas to Action

4. Prioritizes Learning and Ethics (Important, but lower priority)	
Prioritizes Own and Other's Learning	Learner/Teacher
Learns from Mistakes	Mindful and Reflective
Stands Up for What is Right	Integrity/Courage

5. Shows Self Confidence and Delegation (Important, but lower priority)	
Easily Holds Own in Group	Field Independent
Not Easily Intimidated	Self Confident
Not Biased to Do Everything by Self	Moderate Control Needs

IV. Needed Fit with Organization Culture

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Desired CFO Fit	Characteristic
Adaptable to Peter's (Strategic), Reid's (Operational), Brock's (Technical) Styles	Adaptive Style
Doesn't Require Trappings of Power to Feel Good About Self	Values Ach Over Status
Sees Position as Much More than a Job	Puts Skin in Game
Fits with "Family" Atmosphere	Enjoys Relationships
Comfort with Low Structure and Gradually Building It	Tolerance for Ambiguity
Functions as Integral ("Of the Body") Part of Team	High Inclusion Need
High Focus on Customer Relations, Needs and Solutions	Customer Oriented
Driven to "Make the Best Better"	Strives for Excellence
Comfort in High Growth Business with Low Key Atmosphere	Non Prima Donna
Builds Trust with Others at All Levels	Values Trust
Has Soft Touch in Dealing With Staff Issues	Cares about People
Other: Rolls up sleeves	