



The Association of
Accountants and
Financial Professionals
in Business

IMA Executive Roundtable

Playbook for Uncertainty

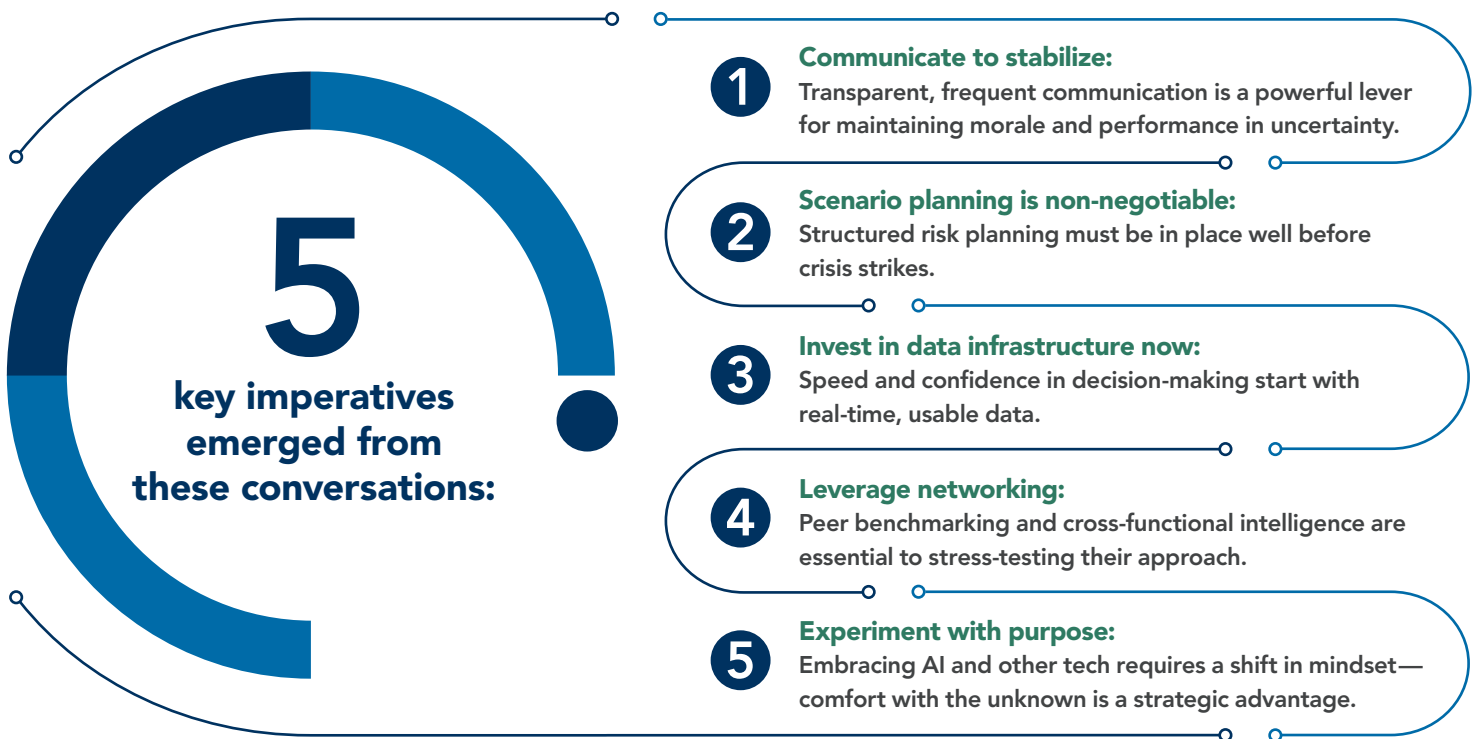


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Executive Summary:

Today's financial leaders must navigate rising geopolitical risk, economic fragmentation, and disruptive technologies—all at once. In this environment, financial leaders are not just managing financials; they are shaping strategy amid volatility. Keeping their business resilient, profitable, and ahead of disruption is their responsibility. As the management accounting experts within the business, they fulfill the dual functions of safeguarding finances while setting strategy for future growth opportunities.

In two recent global roundtable sessions, financial leaders shared their strategies for navigating disruption and building resilient organizations.



About the Session:

IMA® (Institute of Management Accountants) convened global senior finance leaders across industries and regions for two private roundtable sessions exploring how they are navigating disruption. Participants shared practices for managing teams through volatility, de-risking operations, and embedding long-term resilience into financial leadership.

This brief distills those peer conversations into a playbook for financial leaders—and serves as a preview of the insights available through IMA's executive programming for corporate members.

To Build Trust Model Empathy and Communicate Transparently

In periods of uncertainty, silence from leadership creates anxiety, slows execution, and can affect employees in a variety of ways, from frustration to paralysis to panic. Financial leaders must instill trust in their employees, set the tone, provide visibility, and maintain a human connection with teams.

What Works:

- Model empathy and transparency even when outcomes are unknown
- Establish consistent update cadences (weekly, monthly, by function)
- Provide specialized support for high-performing or at-risk teams
- Reinforce purpose and goals to sustain momentum



Even when we didn't have all the answers, we were going to be transparent about it. ”

— \$30 billion in revenue consultancy company



Eighty percent of your plans should already be in place when crisis hits. When people are stressed, their brain is not working as it should and decision-making can be impaired. ”

— \$10 billion in revenue financial / insurance company

Teams Ready for Anything Build Agility through Scenario Planning

Organizations with robust enterprise risk management have playbooks in place for crisis. From semi-predictable events, like digital transformation projects or lagging behind competitors, to more unpredictable ones, like sudden price increases from key suppliers, every organization should conduct regular “what-if” scenario planning for responding to disruptions.

What Works:

- Create actionable contingency plans tied to specific triggers (e.g., sales drops, inflation spikes)
- Empower faster, more confident decision-making by identifying roles and responsibilities in simulated events
- Prioritize risks by impact in the short, medium, and long-term

Faster, Smarter Decisions across The Business Require Investment in Real-Time Data

Decision-useful, quality data is essential to managing uncertainty. Every organization should be working toward a single source of truth with their insights. Without data discipline, in a crisis, information can come from multiple sources with varying levels of accuracy. Proper data infrastructure needs to be in place before crisis strikes. For this reason, double down on data lakes and digital platforms. Also make sure frontline managers have access to the real-time numbers they need, via Excel or Power BI, to make decisions efficiently and react appropriately.

What Works:

- Upskill employees in data analytics and AI
- Determine what is decision-useful data and implement sound data governance principles
- Invest in a centralized data hub accessible to the whole organization



When you go deep into the data and explanation mode, you have to make sure you don't wind up bottlenecking and getting stuck. Data needs to be actionable.

— \$30 billion in revenue aerospace, automation, and energy company



Connections with your counterparts are an important part of managing uncertainty.

— \$27 billion in revenue pharmaceutical, healthcare, and life sciences company

Compare Notes with Your Peers for Insights

Financial leaders have much to learn from peers and competitors about building more resilient organizations. On-going competitive intelligence activities can help benchmark crisis-readiness and action plans for mitigating risk. Establishing good relationships with key leadership and stakeholders, by demonstrating a willingness to partner to solve challenges, will heighten the influence of finance and accounting. Participating in peer-to-peer exchanges facilitated by professional associations can also yield valuable insights.

What Works:

- Implement a defined competitive intelligence function
- Work cross-functionally within the organization for best practice sharing
- Establish good relationships with leadership and key stakeholders
- Attend conferences and events in your industry for peer-networking

Innovation from Finance Requires Space to Test and Learn New Tech

AI and other emerging tech can enable speed in responding appropriately to uncertainty. Embracing a spirit of experimentation and innovation can help proactively find solutions to the next crisis or capture the next growth opportunity. Become conversant with the benefits and risks of technology in order to effectively govern cybersecurity and data privacy initiatives.

What Works:

- Implement an enterprise risk management strategy, accounting for new risks from emerging technology
- Generate more curiosity about technology and incentivize upskilling
- Hire tech-savvy individuals with non-traditional backgrounds to complement your team



Finance people like to be the ones with all the answers, but in today's environment it is important to foster comfortability with the unknown and a spirit of play and experimentation. ”

— \$30 billion in revenue pharmaceutical, healthcare, and life sciences company




From Reactive to Anti-Fragile: Next Moves for Financial Leaders

To build organizations that get stronger under stress, balance rigor with adaptability. That means embedding resilience into systems and teams—not waiting for external shocks to dictate change.

Ask:

- Are we communicating with the frequency and transparency uncertainty demands?
- Have we practiced our risk response—not just documented it?
- Do our managers have access to real-time, decision-ready data?
- Are we learning fast enough from our peers and competitors?
- What's our posture toward AI—defensive, passive, or experimental?



Reports like this are possible because of the insights and community of IMA's global network. Attend future roundtables and executive briefings with a corporate membership to IMA.

Visit enterprise.imaglobal.org or email corporate@imanet.org



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