

# 6 Steps to Becoming a More Effective CFO

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Sara Kaur, CPA

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# Moderator



**Sue Khawaja**  
**Business Development Manager**  
**IMA**

# Featured Presenter



**D. Scott Beaver**  
**Senior Product Marketing Manager**  
**Oracle NetSuite**

# Scott Beaver's Biography

- Scott Beaver is a Senior Product Marketing Manager for Oracle NetSuite. In this role he is responsible for developing messaging, positioning and content for NetSuite ERP and Financial Management solutions.
- Scott has over 15 years of product marketing experience working with both technology industry leaders and startups. Prior to joining NetSuite, he held roles with Sage and Blue Yonder (formerly JDA) and led marketing for several companies that were ultimately acquired. His areas of expertise include Financial Management & Accounting, Enterprise Resource Planning, Strategic Planning and Blockchain.

# Featured Presenter



**Sara Kaur, CPA**  
**Chief Financial Officer**  
**Codex Beauty Corp.**

# Sara Kaur's Biography

- Sara directs all aspects of the finances for Codex Beauty Labs, implementing strategies with a disciplined and risk-managed approach to growth and scale.
- She has spent more than two decades leading global finance operations within the technology and semiconductor industries at companies including Finesse Solutions, Google and Honeywell based in the Bay Area, California. Her work experience includes general management and stewardship of the businesses, handling compliancy with the Sarbanes-Oxley Act to establish responsible auditing and setting up a global enterprise.
- Sara holds a Masters in Finance from Birmingham City University and is a CPA with the California Board of Accountancy.

# Learning Objectives

*Upon completing this webinar, you will be able to:*

1. Summarize the new responsibilities of the CFO.
2. Recognize the most common habits of highly effective CFOs.
3. Describe the inherent skills and proficiencies your executive team, board and other key stakeholders expect you to possess from day one.
4. Explain how to effectively partner across functions up and down the organization in any environment.



# The Role of the CFO Has Evolved

# Polling Question 1

What is the top priority of today's CFO?

- a) Identifying areas for savings
- b) Using data more effectively
- c) Implementing or optimizing business systems
- d) Managing CEO and/or Board expectations
- e) Identifying areas for strategic investment

# Polling Question 1 Results (Placeholder)

# Focus on long-term strategic goals





**Adhere to a strict code  
of ethics**

# Build and maintain relationships





**Identify opportunities  
...not just risks**

# Polling Question 2

How involved is your organization's CFO in identifying/developing new sources of revenue?

- a) Leads these efforts
- b) Very involved, but does not lead
- c) Somewhat involved
- d) Little or no involvement
- e) Don't know



# Polling Question 2 Results (Placeholder)

# Develop and engage your team



# Polling Question 3

Does your organization have a formal career development plan for finance staff?

- a) Yes
- b) No
- c) I don't know

# Polling Question 3 Results (Placeholder)



**Scan the horizon for  
what's next**

# Polling Question 4

Which of the habits we discussed should a CFO spend the most time on?

- a) Focus on long-term strategic goals
- b) Adhere to a strict code of ethics
- c) Build and maintain relationships
- d) Identify opportunities...not just risks
- e) Develop and engage your team
- f) Scan the horizon for what's next

# Polling Question 4 Results (Placeholder)

# Questions & Answers

*Use the Q & A Panel to send your questions to our panelists.*



**D. Scott Beaver**  
**Senior Product Marketing Manager**  
Oracle NetSuite



**Sara Kaur, CPA**  
**Chief Financial Officer**  
Codex Beauty Corp.



**Sue Khawaja**  
**Business Development Manager**  
IMA



# Thank You to Our Featured Presenters!



**D. Scott Beaver**  
**Senior Product Marketing Manager**  
Oracle NetSuite



**Sara Kaur, CPA**  
**Chief Financial Officer**  
Codex Beauty Corp.

# Final Reminders

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