

Controllers as Strategic Advisors Beyond the Financial Statements

NASC 2022: Annual Conference



Deloitte Presenters



Managing Director
Deloitte Consulting LLP

Amy Tener

Amy Tener has more than 25 years of experience and more than a decade responsibility across Federal, State & Local, and Not-For-Profit clients. She has architected large outsourcing and business services engagements and built high performing teams to help clients drive large-scale transformations, increase capabilities, and reduce operating costs. Amy is a leader and mentor who knows that a diverse workforce and inclusive environment facilitates the thinking, collaboration, and innovation necessary in large complex engagements. As a graduate from Oklahoma State University for both her Bachelors (B.A. Economics) and Masters (M.A. Economics), Amy is proud to be living back in Oklahoma and working with State and Local governments to help make a difference in the efficiency of government services.



Senior Manager
Deloitte & Touche LLP

Beth Portman

Beth Portman is a senior manager in Deloitte's Accounting & Internal Controls practice. An experienced leader with a demonstrated track record in process improvement, systems design, and implementation, and project management, Beth has more than 35+ years experience in Government, Public Sector, Health Care and Financial Services organizations in various financial accounting and project management roles along with significant project experience with multiple ERP applications. Beth's project approach is to focus on business process leading practices and her objective is to help clients optimize their system configurations and chart of accounts (COA) design. With more than 20 years in project management and systems implementations, Beth knows how to deliver projects to help clients achieve a successful go-live. Beth has an MBA in Finance and International Business from New York University.

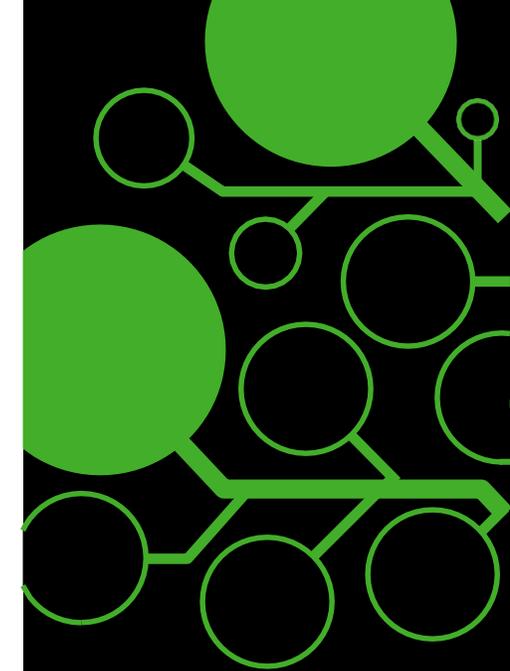
Is your Controllershship in the **Green**?

Today's Controllershship is faced with a shifting landscape fraught with both challenges and opportunities. "In the Green" represents the pinnacle of financial health, business growth, and sustainability...but the journey can be treacherous. **How can you thrive** in an era of big data and ever-changing accounting regulations? **How do enabling technologies play into your future** - Robotic Process Automation (RPA), Artificial Intelligence (AI), Cloud, Analytics and Natural Language Generation (NLG)? How will you engage and develop the "workforce of the future" to **enhance your efficiency and effectiveness**?

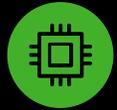
Controllershships that are truly "in the Green" are addressing today's challenges head on. They realize that **data comprises the nutrition** they need to feed the organization as they **centralize and harmonize financial information**. They automate routine processes in order to free up human capacity to focus on more value-added work, and they apply that talent toward analytics to unlock business value. They see **Controllershship as a growth engine** for the organization as they enable controlled expansion with an ever-evolving workforce.

*Place your Controllershship in the **Green**.*

Harmonize. Automate. Grow.



Controllingship in the Green



**TECHNOLOGY
ENABLEMENT**



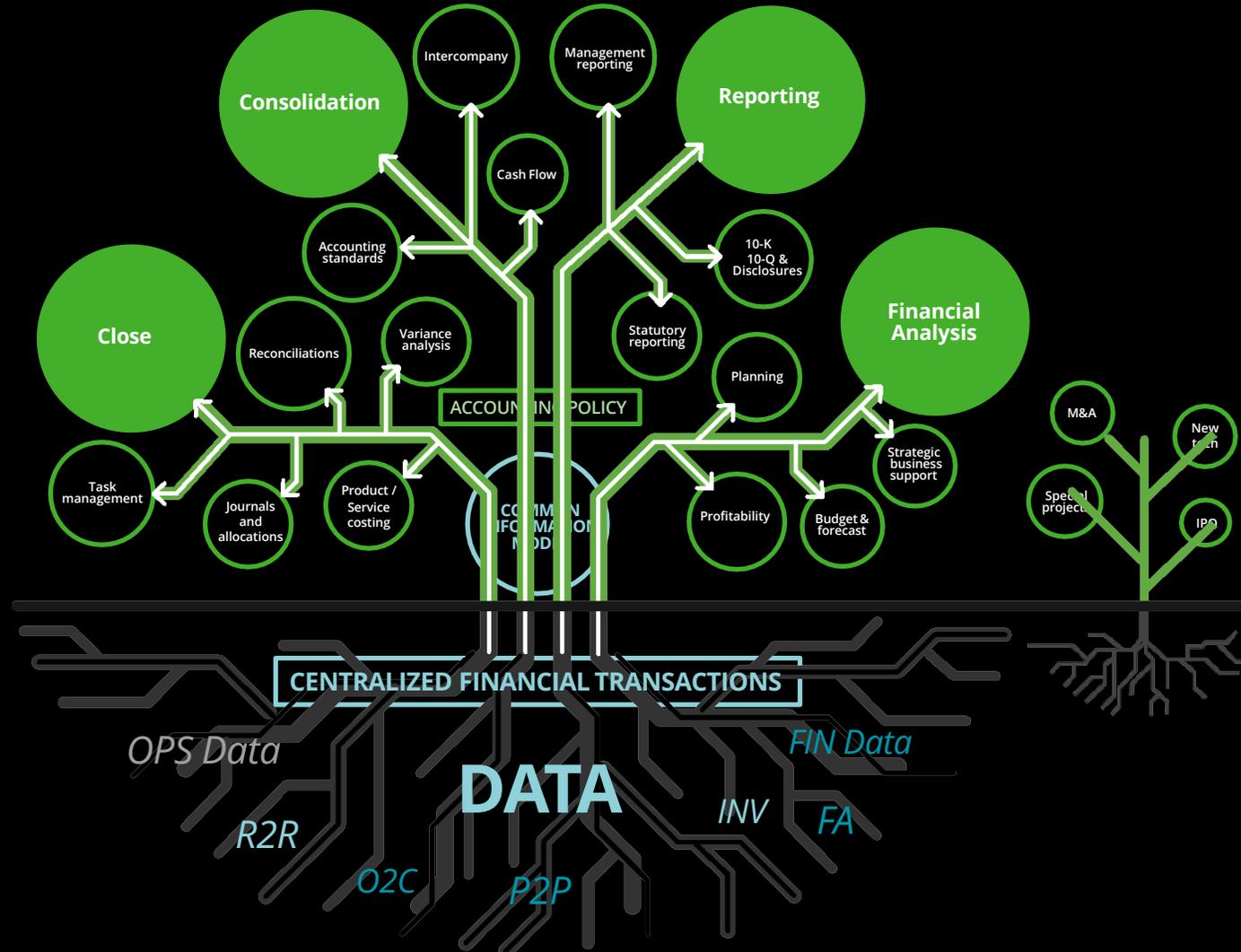
**GOVERNANCE &
COMPLIANCE**



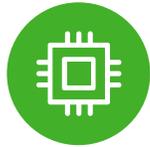
**DATA &
ANALYTICS**



**DELIVERY
MODEL**



Core functions: Harmonize. Automate. Grow.



TECHNOLOGY ENABLEMENT

It is proving increasingly important for controllership functions to evolve by strategically leveraging technology to help improve operational performance, insight generation, and risk intelligence across the organization.



DATA & ANALYTICS

The controllership function now goes beyond accurate financial statements and reports. They now must leverage data analytics and interpretation of the results to support critical decision making.



GOVERNANCE & COMPLIANCE

Compliant financial stewardship is a table stake for controllership functions, but organizations must also optimize governance and compliance programs.



DELIVERY MODEL

The controllership function of the future requires technology and business savvy accounting professionals (considering next flexible work models) who can leverage a plethora of different technologies to deliver value as trusted finance business partners.

Common challenges

- Increased data volumes, disparate systems, and outdated reporting methods lead to inefficiency and risk.
- Manual processes result in higher costs and lower employee satisfaction
- Time, money, and effort is wasted in record-to-report processes due to a lack of integration, isolated systems, and inefficient processes.

- Key data is pulled from disparate source systems where access and usability is commonly restricted.
- Limited data and analytics capabilities result in inefficiencies and lack of strategic direction.
- Manual data collection and manipulation activities leaves minimal time for value-add interpretation of data.

- Non-standardized processes and controls result in control inefficiencies and fragmented oversight and decision making.
- Manual control monitoring and periodic control testing increase an organization's risk.
- Decentralized and immature governance programs result in inability to realize speed to value from digital transformation.

- Employers to re-think job and education requirements in order to ensure that they are tapping full potential of employees.
- Controllership function leading practices require organizations to rethink outsourcing opportunities for core activities and/or surge support.
- Shifting talent models require employers to re-think the traditional 8-5 cubical model.



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