

GrowCFO Finance Team Training

Individual Learning Plan for _____

| Employee Details | |
|------------------|--|
| Full Name | |
| Role | |
| Reporting to | |
| Review date | |

Finance Team Courses

Please work with your relevant training team leader to create your learning plan structure using this table.

| To Complete | Course | Topics Covered | Deadline Please reference course release dates to assist with setting your deadlines. | Date Completed |
|--------------------------|---------------------------|--|--|----------------|
| <input type="checkbox"/> | 1. Communication | Knowing your audience, Conveying your messages, Handling difficult conversations, Group meetings and presentations, Written communications. | | |
| <input type="checkbox"/> | 2. Relationship-building | Building new relationships, Strengthening existing relationships, Gaining other people's trust, Perception of finance, Managing stakeholders | | |
| <input type="checkbox"/> | 3. Personal effectiveness | Gravitas & Confidence, Managing your workload, Delegating effectively, Delivering your responsibilities, Exceeding expectations | | |
| <input type="checkbox"/> | 4. Optimising processes | Process mapping, Standardisation, Lean Six Sigma, Automating processes, Outsourcing activities | | |
| <input type="checkbox"/> | 5. Business partnering | Understanding the business model, Connecting with teams, Generating data insights, | | |

| | | | | |
|--------------------------|---|--|--|--|
| | | Supporting decision-making, Influencing strategy and change | | |
| <input type="checkbox"/> | 6. Planning, budgeting & forecasting | Creating investment cases, Building financial models, Allocating capital, Monitoring budgets, Managing outcomes | | |
| <input type="checkbox"/> | 7. Analysing & reporting performance | Setting KPIs, Capturing data, Analysing data, Reporting performance [including commercial awareness], Creating Board packs | | |
| <input type="checkbox"/> | 8. High-performance teams | Building the culture, Objectives and appraisals, Teamwork, Interaction with others, Managing people | | |
| <input type="checkbox"/> | 9. Catalyst for change | Driving business change, Identifying profit and cash initiatives, Finance transformations, Monitoring effectiveness, Restructuring | | |
| <input type="checkbox"/> | 10. Governance and Control | Governance, Risk Management Compliance, Treasury, Closing the books | | |

Supplemental GrowCFO Courses, Events and Insights

(Optional) Outline your interest in incorporating other learning and networking resources to supplement your learning and development plan including: [The GrowCFO Competency Framework](#), [additional courses](#), workshops and thought-leadership [events](#), 1:1 or group [mentoring](#), finance leader [forum](#), and content ([podcast](#), webinar recording [library](#)).

| Notes / Comments |
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