



7 steps to help your first 90 days in a finance role go without a hitch

We sat down with Peter Simons, Technical Specialist in Research and Development at CIMA (Chartered Institute of Management Accountants), to get his advice on what you can do to ensure your first 90 days in a new finance role are a success.

1. Do your homework

Before you join, and in most cases before your interview, you need to have done your homework. You obviously have to go to the company's website; you've hopefully read the annual report. You need to have given some thought to why you're the right person for the job and what you've got to bring to the organisation.

2. Get to know your boss

You've got to go and meet the people on the first day – you'll do a lot of handshaking! Start with your boss. You're going to be his or her right hand and that person will have a style they operate in, so you have to make sure you understand them. And you have to be prepared to adapt your own personality and your own way of doing things to fit their preferred way of doing things.

3. Don't forget that you're joining a team

You also need to remember that you're joining a team: the other managers in your organisation. You need to build a relationship with them, based on mutual respect. The same goes for the people who work for you. You need to make sure they're on board because they are the ones who get the work done and ultimately protect you.

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"Be prepared to adapt your own personality to fit your boss's way of working."

"If you get the numbers wrong, your credibility is shot."

4. Make sure you're confident in the numbers

As a financial director you're not just reporting on the business, but if you get the numbers wrong, your credibility is shot. There are things you need to get right. You need to make sure you're confident in the numbers and you understand where they come from.

5. Develop, don't just manage

You're going to be responsible for the management and development of the finance function. So you need to consider both – nobody is looking for a maintenance manager. The finance function is transforming to become more efficient, to provide better information and to be more influential in the business. You should know where the finance function is on that transformation journey.

6. Make sure you deliver

You have to build your credibility. If there were things you said you could do when you were interviewed you'd better do them, or make progress towards doing them, pretty early on within the 90 days. And maybe look for a few quick wins.

7. Have a plan

You need to have an idea of what you're going to do, but then you need to flex that to fit the business. Go in with a plan of how you're going to manage the first 90 days. Postpone holidays, and tell your partner you're going to be busy for a while! And by the end of the 90 days you should have a plan of how you're going to develop the finance function, and better support the business, and hopefully have a couple of success stories under your belt.

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