



Finance Transformation Playbook

Expert-led Capability Program for Building High-Performance Finance Organizations in PE-Backed Portfolio Companies

3 Months | Coaching | Immersions

Designed for CFOs, Finance Controllers, FP&A Leaders and Finance Teams responsible for improving financial performance, strengthening governance and enabling value creation.

Finance Transformation Playbook

A Dedicated, Expert-Led Program for Portfolio Companies Building High-Performance Finance Functions

For Operating Partners supporting finance transformation initiatives across their portfolio companies—helping finance leadership teams strengthen planning, reporting, cash management and strategic decision-making to accelerate enterprise value.

Our Signature Program

Built around your finance organization—not generic finance training.

Every engagement is customized using your reporting frameworks, budgeting processes, financial KPIs and business priorities.

Faculty who've led finance transformations.

Sessions are delivered by former CFOs, Finance Directors, FP&A Leaders, Treasury Heads and Finance Transformation specialists—not trainers teaching accounting concepts.

Learning through implementation.

Participants work on live financial challenges, reporting frameworks, dashboards and transformation initiatives throughout the program.

Covers the complete finance function.

From FP&A and Working Capital to Treasury, Board Reporting and Capital Allocation, the program develops capabilities across the finance organization.

Focused on measurable business impact.

Each engagement concludes with a Finance Transformation Roadmap aligned to the organization's Value Creation Plan.

Powered by India's Largest Expert Network.

Access CFOs, finance leaders, investment professionals and sector experts from Infollion's expert ecosystem.

At a Glance

Format	Expert-led workshops + implementation coaching
Duration	12 weeks
Cadence	Weekly 3–4 hour sessions
Delivery	Virtual / Onsite / Hybrid
Structure	4 Core Modules + 4 Elective Modules
Pre-Program	Finance Capability Assessment
Post-Program	Finance Transformation Roadmap

Designed for:

Chief Financial Officers
(CFOs) Finance Controllers

FP&A Leaders
Treasury Heads

Finance Business Partners
Commercial Finance Teams

Core Modules

Module 1: Financial Planning & Performance Management

Building robust financial planning capabilities that improve decision-making, forecasting accuracy and business performance.

Topics Covered

1. FP&A Excellence
2. Budgeting & Rolling Forecasts
3. Business Performance Management
4. Management Information Systems (MIS)
5. Financial KPI Dashboards

Module 2: Working Capital & Cash Flow Excellence

Improving liquidity, cash flow visibility and capital efficiency through disciplined financial management.

Topics Covered

1. Working Capital Optimization
2. Cash Flow Forecasting
3. Receivables & Payables Management
4. Inventory Finance
5. Cash Conversion Cycle Improvement

Module 3: Finance Business Partnering & Decision Support

Transforming finance into a strategic business partner that supports commercial and operational decision-making.

Topics Covered

1. Finance Business Partnering
2. Business Case Development
3. Cost & Profitability Analysis
4. Pricing & Investment Decisions
5. Cross-functional Collaboration

Module 4: Governance, Risk & Value Creation

Strengthening governance, board reporting and financial controls to support sustainable growth and investor confidence.

Topics Covered

1. Board & Investor Reporting
2. Financial Governance
3. Risk Management Frameworks
4. Capital Allocation
5. Value Creation Metrics

Elective Modules

Elective 1: Treasury & Capital Management

Building treasury capabilities that improve liquidity, funding decisions and financial resilience.

Topics Covered

1. Treasury Operations
2. Banking Relationships
3. Capital Structure
4. Debt Management
5. Foreign Exchange Risk

Elective 2: M&A, Integration & Exit Readiness

Preparing finance teams to support acquisitions, integration initiatives and successful exits.

Topics Covered

1. Financial Due Diligence
2. Post-Merger Integration
3. Synergy Tracking
4. IPO & Exit Readiness
5. Data Room Preparation

Elective 3: Digital Finance Transformation

Leveraging technology and automation to modernize finance operations and improve productivity.

Topics Covered

1. ERP Optimization
2. Finance Automation
3. AI in Finance
4. Dashboarding & Analytics
5. Digital Finance Operating Models

Elective 4: Strategic Cost & Profitability Management

Building advanced capabilities to improve margins, optimize costs and strengthen profitability.

Topics Covered

1. Activity-Based Costing
2. Cost Transformation
3. Profitability Analytics
4. Zero-Based Budgeting
5. Margin Improvement Strategies

Finance Transformation Immersions

Participants may choose to complement the learning journey through curated interactions with finance leaders and organizations recognized for finance excellence.

- CFO Leadership Roundtables
- Finance Transformation Benchmark Visits
- FP&A Best Practice Workshops
- Investor & Board Reporting Masterclasses