



THE SYSTEM CFO SERIES
HINDOL DATTA

FREE ASSESSMENT

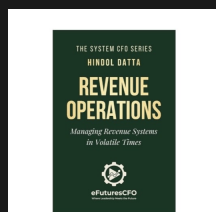
PILLAR 5: GOVERNANCE & GLOBAL STRUCTURE | TOOLKIT #31 OF 37

THE CFO-CEO STRATEGIC ALIGNMENT DIAGNOSTIC

*Building the Partnership That
Drives Enterprise Value*

20-Question Diagnostic | 5-Page Assessment

Score Your Organization 1-5 Across Four Dimensions
Identify Gaps and Build Your Action Plan



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Where Leadership Meets the Future

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QUESTIONS 1-5

Section A: Strategic Partnership and Communication Cadence

Are You a Strategic Partner — or Just the Person Who Reports the Numbers?

The CFO-CEO relationship is the most consequential partnership in the organization. When it works, the CEO has a thought partner who challenges assumptions, quantifies risk, and translates strategy into resource allocation. When it fails, finance becomes a reporting function and the CEO makes decisions without financial rigor. The System CFO actively builds this partnership through structured communication, shared context, and mutual trust.

A. STRATEGIC PARTNERSHIP AND COMMUNICATION CADENCE

1	The CFO and CEO have a regular one-on-one cadence — at least weekly — dedicated to strategic discussion, not just operational reporting or crisis management.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
2	The CFO is involved in strategic decisions before they are made — not asked to model the financial impact after the decision is already committed, but consulted during the	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
3	The CFO provides proactive strategic analysis — identifying opportunities, risks, and trade-offs before the CEO asks, rather than operating solely in a responsive mode answering	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
4	Communication styles are aligned — the CFO presents financial information in the format and level of detail the CEO finds most useful, adapting to the CEO's decision-making style and	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
5	The CFO has access to all strategic information — board communications, investor conversations, competitive intelligence, and partnership discussions are shared with the	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best

SECTION A SCORE: Total: _____ / 25 Average: _____ / 5

QUESTIONS 6-10

Section B: Financial Storytelling and Board Communication

Can You Translate Financial Data into Strategic Narrative?

The CEO needs the CFO to translate numbers into narrative. Revenue increased 15% — but is that good? Margins declined 200 basis points — but is that intentional investment or operational deterioration? The System CFO builds the financial story that connects metrics to meaning, results to strategy, and data to decisions, enabling the CEO to communicate confidently with the board, investors, and employees.

B. FINANCIAL STORYTELLING AND BOARD COMMUNICATION

6	Board presentations tell a strategic story — not just reporting results, but connecting financial performance to strategic progress, market dynamics, and forward-looking	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
7	The CFO and CEO align on the narrative before board meetings — key messages, risk disclosures, and strategic recommendations are discussed and agreed upon before presentation to the	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
8	Financial materials are concise and decision-oriented — board packages focus on the 5-7 metrics that matter most, with supporting detail available but not front-loaded into the	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
9	Investor and lender communications are consistent with board communications — the same financial narrative is delivered to all external stakeholders, with appropriate tailoring of	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
10	The CFO can articulate the business strategy in non-financial terms — demonstrating deep understanding of the business model, competitive landscape, and customer value proposition	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best

SECTION B SCORE: Total: ____ / 25 Average: ____ / 5

QUESTIONS 11-15

Section C: Constructive Challenge and Risk Communication

Can You Tell the CEO 'No' — and Are You Heard When You Do?

The most valuable thing a CFO can do is tell the CEO something they do not want to hear — and be heard. Challenging unrealistic targets, flagging hidden risks, questioning acquisitions that do not pencil, and pushing back on spending that does not generate returns requires both courage and credibility. The System CFO builds the trust and track record that makes constructive challenge welcome rather than threatening.

C. CONSTRUCTIVE CHALLENGE AND RISK COMMUNICATION

11	The CFO challenges strategic assumptions with data — when the CEO proposes an initiative, the CFO tests the underlying assumptions (market size, conversion rates, cost estimates)	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
12	Risk communication is structured and actionable — the CFO presents risks with quantified impact, probability assessment, and mitigation options rather than vague warnings that are	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
13	The CFO has the standing to slow down decisions — when financial analysis suggests an initiative needs more evaluation, the CFO can request additional time without being	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
14	Disagreements between the CFO and CEO are resolved productively — when they disagree on a strategic question, there is a respectful process for debate, analysis, and	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
15	The CFO raises early warning signals proactively — performance deterioration, market shifts, and emerging risks are communicated to the CEO as they develop, not when they become	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best

SECTION C SCORE: Total: _____ / 25 Average: _____ / 5



QUESTIONS 16-20

Section D: Organizational Influence and Cross-Functional Leadership

Does the CFO Have Influence Beyond Finance — Across the Entire Organization?

The modern CFO is not the head of the accounting department — the CFO is the co-pilot of the enterprise. This requires influence that extends beyond the finance function into every part of the organization. The System CFO builds relationships with sales, product, engineering, and operations leaders, earns credibility through business understanding, and positions finance as a strategic enabler rather than a control function.

D. ORGANIZATIONAL INFLUENCE AND CROSS-FUNCTIONAL LEADERSHIP

16	The CFO has strong relationships with all functional leaders — sales, product, engineering, operations, and HR leaders view the CFO as a trusted advisor, not just the person who approves	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
17	Finance business partners are embedded in key functions — dedicated finance professionals support business units with analysis, planning, and decision support that makes finance a	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
18	The CFO participates in non-financial strategic discussions — product strategy, market positioning, organizational design, and talent strategy benefit from the CFO's analytical	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
19	The CFO drives organizational performance management — the KPI framework, accountability structure, and performance review process reflect the CFO's influence in connecting financial	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
20	The CFO is viewed as a potential CEO successor or peer — the breadth of business understanding, strategic thinking, and organizational leadership demonstrated by the CFO positions	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best

SECTION D SCORE: Total: ____ / 25 Average: ____ / 5

OVERALL ASSESSMENT SCORE
 Section A: ____ / 25 Section B: ____ / 25 Section C: ____ / 25 Section D: ____ / 25 TOTAL: ____ / 100 AVG: ____ / 5

GAP TO GOAL

Gap-to-Goal Action Plan

Bridging the Gap — CFO-CEO Strategic Alignment Diagnostic

Transfer your five lowest-scoring questions. For each gap, define the target state, specific actions, owner, timeline, and success metric. Focus on highest-impact gaps first.

GAP #	Q REF	CURRENT	TARGET	SPECIFIC ACTION TO CLOSE GAP	OWNER	DEADLINE	METRIC
1	Q__	___/5	___/5	_____	_____	_____	_____
2	Q__	___/5	___/5	_____	_____	_____	_____
3	Q__	___/5	___/5	_____	_____	_____	_____
4	Q__	___/5	___/5	_____	_____	_____	_____
5	Q__	___/5	___/5	_____	_____	_____	_____

ASSESSMENT SUMMARY

Completed by: _____ Date: _____

Overall average score: ___ / 5 Items scored 1-2 (critical): ___

Items scored 3 (developing): ___ Items scored 4-5 (strong): ___

Top strength: _____

Most critical gap: _____

One action this week: _____

READY TO GO DEEPER?

This free assessment identified your gaps. The Premium System CFO Toolkits provide the frameworks, templates, and action plans to close them. Visit EfuturesCFO.com





READY TO GO DEEPER?

This Assessment Identified the Gaps. The Premium Toolkit Closes Them.

PREMIUM: The Systems CFO Manifesto Canvas (12 Pages)

The full premium toolkit includes the complete Systems CFO identity framework, strategic positioning templates, stakeholder influence mapping, communication style assessment, and the comprehensive manifesto development process for defining your leadership philosophy and organizational impact.

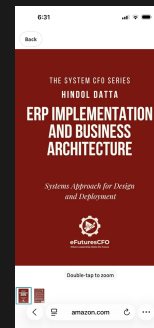
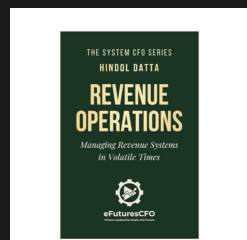
*Plus: Access the Super Exclusive 46-Page
System CFO Organizational Finance Assessment Kit*

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