



THE SYSTEM CFO SERIES  
HINDOL DATTA

FREE ASSESSMENT

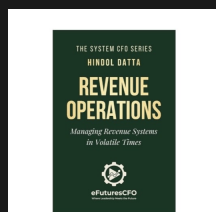
PILLAR 1: STRATEGIC SYSTEMS | TOOLKIT #39 OF 37

# THE FINANCE OPERATING MODEL MATURITY DIAGNOSTIC

*Assessing Where You Are on the  
Journey from Bookkeeper to Strategic Partner*

20-Question Diagnostic | 5-Page Assessment

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



EfuturesCFO.com

Where Leadership Meets the Future

(C) 2026 Hindol Datta. All Rights Reserved.

**QUESTIONS 1-5**

# Section A: Transaction Processing and Operational Foundation

*Is Your Operational Foundation Solid Enough to Build Strategic Capability On Top?*

*Strategic finance capability cannot be built on a crumbling operational foundation. If the books are not accurate, the close is not timely, and the controls are not reliable, no amount of strategic aspiration will overcome the credibility deficit. The System CFO honestly assesses operational maturity first — ensuring the foundation is solid before investing in the strategic superstructure.*

**A. TRANSACTION PROCESSING AND OPERATIONAL FOUNDATION**

<b>1</b>	Core transaction processing is reliable and accurate — AP, AR, payroll, and general ledger transactions are recorded accurately, timely, and with appropriate controls, with error	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
<b>2</b>	The monthly close is completed within target timelines — the close process runs predictably on schedule without heroics, delivering accurate financials within the organization's	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
<b>3</b>	Reconciliations are current and complete — all material balance sheet accounts are reconciled monthly with aging items tracked, escalated, and resolved within defined timeframes.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
<b>4</b>	Compliance obligations are met consistently — tax filings, regulatory reports, statutory requirements, and audit requests are completed on time without penalties or deficiencies.	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
<b>5</b>	The operational foundation requires minimal management intervention — routine finance operations run smoothly through documented processes and trained staff, freeing leadership for	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 Planning and Analysis Capability

*Can You Explain What Happened, Why It Happened, and What Will Happen Next?*

*FP&A is the bridge between operational finance and strategic partnership. A mature FP&A function does not just report results — it explains variance drivers, builds predictive models, runs scenarios, and provides actionable recommendations. The System CFO evaluates whether FP&A delivers insight that changes decisions or merely produces reports that confirm what leadership already knows.*

**B. FINANCIAL PLANNING AND ANALYSIS CAPABILITY**

<p><b>6</b> Variance analysis goes beyond calculation to explanation — budget-to-actual and period-over-period variances are not just quantified but explained with root cause analysis and</p>	<p>1 Non-Ex</p>	<p>2 Ad Hoc</p>	<p>3 Dev</p>	<p>4 Estab</p>	<p>5 Best</p>
<p><b>7</b> FP&amp;A produces forward-looking analysis — the team builds forecasts, models scenarios, and provides projections that inform strategic decisions rather than only reporting on</p>	<p>1 Non-Ex</p>	<p>2 Ad Hoc</p>	<p>3 Dev</p>	<p>4 Estab</p>	<p>5 Best</p>
<p><b>8</b> Driver-based modeling connects operational metrics to financial outcomes — FP&amp;A models link operational inputs (pipeline, headcount, utilization) to financial outputs</p>	<p>1 Non-Ex</p>	<p>2 Ad Hoc</p>	<p>3 Dev</p>	<p>4 Estab</p>	<p>5 Best</p>
<p><b>9</b> Ad hoc analysis is responsive and insightful — when leadership requests analysis, FP&amp;A delivers within 24-48 hours with recommendations and context, not just data in a spreadsheet.</p>	<p>1 Non-Ex</p>	<p>2 Ad Hoc</p>	<p>3 Dev</p>	<p>4 Estab</p>	<p>5 Best</p>
<p><b>10</b> FP&amp;A partners with business unit leaders — dedicated finance business partners support each major function with tailored analysis, planning support, and decision-relevant insight that</p>	<p>1 Non-Ex</p>	<p>2 Ad Hoc</p>	<p>3 Dev</p>	<p>4 Estab</p>	<p>5 Best</p>

**SECTION B SCORE: Total: \_\_\_\_ / 25      Average: \_\_\_\_ / 5**

**QUESTIONS 11-15**

## Section C: Strategic Partnership and Business Influence

*Does Finance Shape Strategy — or Just Keep Score?*

*The highest level of finance operating model maturity is strategic partnership — where the CFO and finance team actively shape business strategy, challenge assumptions, allocate resources, and drive value creation. This requires credibility built through operational excellence, analytical insight, and a deep understanding of the business that extends far beyond the numbers.*

**C. STRATEGIC PARTNERSHIP AND BUSINESS INFLUENCE**

<b>11</b>	The CFO participates in strategic decision-making — not just modeling the financial impact of decisions others have made, but influencing which strategic options are pursued based on	<b>1</b> Non-Ex	<b>2</b> Ad Hoc	<b>3</b> Dev	<b>4</b> Estab	<b>5</b> Best
<b>12</b>	Finance provides proactive strategic recommendations — the team identifies opportunities (pricing, M&A, market entry, cost optimization) and brings them to leadership with	<b>1</b> Non-Ex	<b>2</b> Ad Hoc	<b>3</b> Dev	<b>4</b> Estab	<b>5</b> Best
<b>13</b>	Capital allocation is driven by rigorous financial analysis — investment decisions, resource allocation, and portfolio management are informed by finance-led frameworks rather than	<b>1</b> Non-Ex	<b>2</b> Ad Hoc	<b>3</b> Dev	<b>4</b> Estab	<b>5</b> Best
<b>14</b>	Business leaders view finance as a value-adding partner — cross-functional stakeholders seek out finance input on decisions because the team has demonstrated that its	<b>1</b> Non-Ex	<b>2</b> Ad Hoc	<b>3</b> Dev	<b>4</b> Estab	<b>5</b> Best
<b>15</b>	The finance team understands the business deeply — team members can articulate the competitive landscape, customer value proposition, product strategy, and operational	<b>1</b> Non-Ex	<b>2</b> Ad Hoc	<b>3</b> Dev	<b>4</b> Estab	<b>5</b> Best

**SECTION C SCORE: Total: \_\_\_\_ / 25      Average: \_\_\_\_ / 5**



QUESTIONS 16-20

## Section D: Continuous Improvement and Transformation Capability

*Is Your Finance Function Getting Better Systematically — or Just Getting By?*

*Operating model maturity is not a destination — it is a trajectory. The System CFO builds a finance function that continuously evaluates its own effectiveness, identifies improvement opportunities, implements changes with discipline, and measures results. Organizations that stop improving start declining, because the business environment and stakeholder expectations never stop evolving.*

### D. CONTINUOUS IMPROVEMENT AND TRANSFORMATION CAPABILITY

16	The finance function has a documented transformation roadmap — specific initiatives to improve capability, efficiency, and strategic impact are planned, resourced, and tracked with	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
17	Process improvement is systematic — the team regularly identifies, prioritizes, and implements improvements to finance processes using structured methodologies rather than	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
18	Technology is leveraged for capability advancement — automation, analytics, and AI are deployed strategically to elevate the team from manual processing to insight generation	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
19	The finance operating model is benchmarked externally — the organization compares its finance function's efficiency, capability, and strategic contribution against peer companies	1 Non-Ex	2 Ad Hoc	3 Dev	4 Estab	5 Best
20	The CFO has a clear vision for the finance function's future — an articulated operating model aspiration defines what the finance function will look like in 2-3 years and how it will	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 — Finance Operating Model Maturity 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](http://EfuturesCFO.com)





READY TO GO DEEPER?

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

**PREMIUM: The Burn the Spreadsheet: Systems CFO Toolkit (17 Pages)**

The full premium toolkit includes the complete Systems CFO operating model framework, maturity assessment across all finance dimensions, transformation roadmap templates, and the comprehensive diagnostic for evaluating and elevating your finance function from transactional to

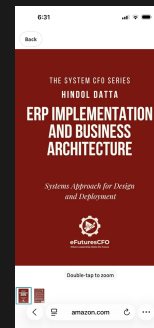
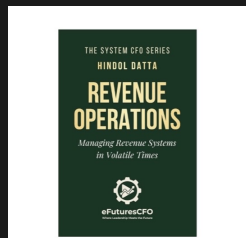
*Plus: Access the <sup>strategic</sup> Super Exclusive 46-Page  
System CFO Organizational Finance Assessment Kit*

### ABOUT THE AUTHOR

## Hindol Datta

25+ years as CFO and VP Finance | \$150M+ in M&A | CPA, CMA, CIA, PMP, CPIM

Author of The System CFO Series | MS Analytics, Georgia Tech



**EfutureCFO.com**

LinkedIn: Hindol Datta | YouTube: @efuturescfo

*Where Leadership Meets the Future*