

## Werde der Controller, den das Business braucht

# BLACK BELT IN FINANCE BUSINESS PARTNERING

## 100-Day Plan: Finance Business Partner (Checklist)

(by Viktor Mendel)

### 📌 Phase 1 (Days 1 to 30): Orientation & Understanding

#### Orientation & Role Clarity

- Define role, objectives, and success criteria clearly with manager
- Establish regular check-ins to continuously clarify expectations

#### Controlling Processes and Systems

- Create inventory of key reports, dashboards, and systems
- Request targeted training sessions for critical tools
- Schedule weekly self-learning sessions

#### Stakeholder Meetings (Introductory)

- Schedule 30-minute meetings with each stakeholder
- Document stakeholder needs clearly („What do you need from me?“)

#### Documentation Assessment

- Collect and organize existing controlling documentation
- Identify gaps or redundancies in documents
- Draft an initial improvement action list

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### 📌 Phase 2 (Days 31 to 60): Building Trust & Relationships

#### In-depth Conversations with Management

- Arrange structured 60-minute one-on-one meetings with key stakeholders
- Develop conversation guidelines (open-ended questions)
- Summarize and document key insights after meetings

#### Regular Communication and Collaboration

- Establish recurring meetings with clear agendas and objectives
- Document outcomes and responsibilities clearly after each session
- Regularly confirm alignment with stakeholders

#### Visibility in Management Meetings

- Prepare concise analytics and data insights prior to meetings
- Actively participate in discussions and clearly communicate your contributions

- Follow-up informally to reinforce your visibility and accessibility
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### Phase 3 (Days 61–90): Quick Wins & Impact

#### Identify and Implement Quick Wins

- Select 3–5 processes or reports to optimize
- Create clear weekly action plans for implementation
- Track and regularly communicate progress

#### Provide Proactive Decision-Support

- Proactively identify areas requiring analytical support
- Provide clear, actionable recommendations to stakeholders
- Regularly emphasize the value and impact of your insights

#### Process Improvement Suggestions

- Analyze current financial processes to detect inefficiencies
- Present concise improvement proposals proactively
- Highlight expected business impact of your recommendations

#### Visibility and Communication of Success

- Prepare a brief “Quick Wins” summary presentation
  - Communicate achievements in meetings or informal exchanges
  - Share your successes via internal communication channels
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### Phase 4 (Days 91–100): Consolidation & Next Steps

#### Stakeholder Feedback Collection

- Conduct feedback sessions with key stakeholders
- Document constructive feedback systematically
- Identify immediate measures for improvement

#### Self-Reflection and Learning

- Write a structured self-reflection of your first 90 days
- Clearly identify successful strategies and areas for development
- Review your reflections with your manager for alignment

#### Define Future Roadmap

- Set clear short-term and mid-term goals for the next six months
- Share your next-steps roadmap transparently with stakeholders
- Gain management support and buy-in for your roadmap