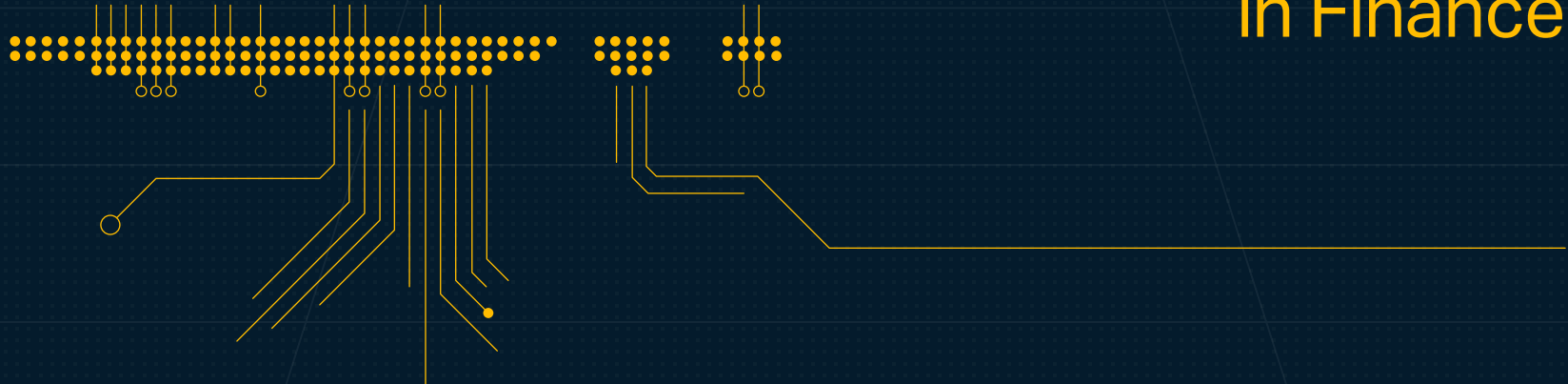


CURRENT TRENDS

in Finance



Hear what industry leaders have to say about the future of finance and **how to optimize your organization for success.**

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01 Evolving to Financial Strategies

The role of finance has changed—it's gone from a number-crunching, back-office job to a true strategic partner across the organization. For today's finance leaders, the right technology can enable their teams to fulfill their strategic objectives and be valuable assets to the organization.

For CFOs, the global pandemic has brought strategic leadership and communication skills to the forefront. CFOs have the opportunity to make history—the old role of managing cost, compliance, and ensuring controls are out the window.



Jack McCullough,
Founder & President, CFO
Leadership Council

The CFO role has become the pinpoint of where data inside the company comes together—there's this needed ability to understand trends and forecasts. The expectation is that you're not just providing historical context but also new information.

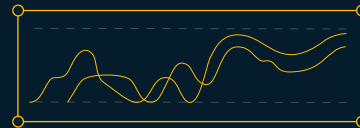


Sarah Spoja
CFO, Tipalti

If you're not implementing technology, you're going to get left behind because your competitors most certainly are. Technology is what makes the role fun these days—the data is at your fingertips, and it facilitates more rapid strategic decision-making.



Jeff Bohl,
CFO, Ontra



02 Preparing for the Creator Economy

The booming creator economy has seen rapid success. Today, companies are nurturing creators and ensuring they're paid on time. With the metaverse around the corner, the time to initiate strong partnerships with these creators is now.

In terms of creative funds, different methodologies are in place and evolving as a way to grease the wheels. You'll soon see a uniform look and feel across different platforms.

Paco Suro
GM Global Partner
Payouts, Tipalti



Engagement is one of the most important statistics for influencers and brand clients. Engagement is a great way to measure ROI, and the creators have to make unique content to find those revenue streams that work.

Josh Marcus
COO & Co-Founder,
Rumble Gaming



You've got traditional incumbents investing significantly in social & creating the future of connecting. Technology is accelerating how we connect and interact online.

James Creech
CEO & Co-Founder,
Paladin



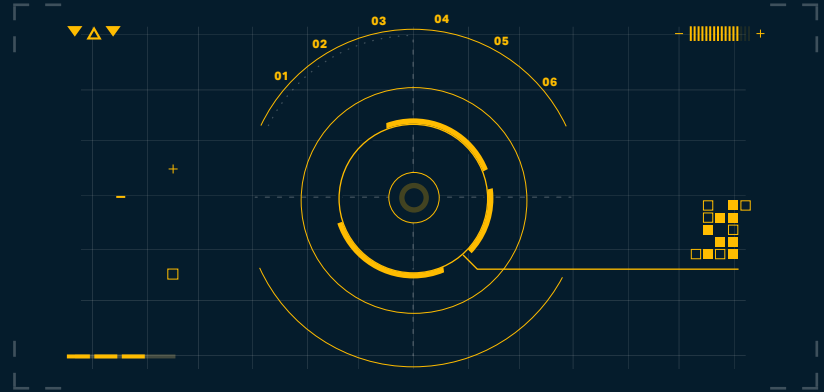
There's a lot of talk about monetizing the creator economy. For brands, they're in the early stages of basic tracking and reporting. Simply put: there's going to be a lot more tools for creators.

Sam Darawish
CEO & Co-Founder,
Everflow



03 Gaining Operational Control & Visibility

In the next few years, finance teams will need to prioritize operational efficiency, reduce costs, implement new technologies, and innovate through digital transformation. These goals present new opportunities for companies to grow while scaling globally.



The challenge for fast-growing companies is the massive discrepancy between where the company is supposed to be—in terms of growth and spend—and where it is.

The priority is driving operational efficiency. There's going to be a focus on automating mundane, administrative processes. It's all about making sure the suppliers are paid on time.

It's important to involve functional finance departments in decision-making to prevent problems. This method efficiently streamlines workflow processes.



Bar Winkler
GM Procurement,
Tipalti



Jenny Draper
GM UK/Europe & Global
Head of Client Services,
Spend Matters



Markus Stellmach
Head of Finance—Systems,
Tier Mobility

04 Streamlining

For Global Expansion

Today, companies expect more from their finance organization. These forward-looking businesses are leveraging their operational functions to drive change and growth internationally.

It's no longer enough for finance to just be a financial scorekeeper. The business wants finance to help identify growth opportunities and to be a change agent.



Mark Brousseau
President, Brousseau & Associates

The right technology is important. As we expand, the technology should scale as we add new entities, like an acquired company and its team. Being able to have a platform that can grow with us has been really important.

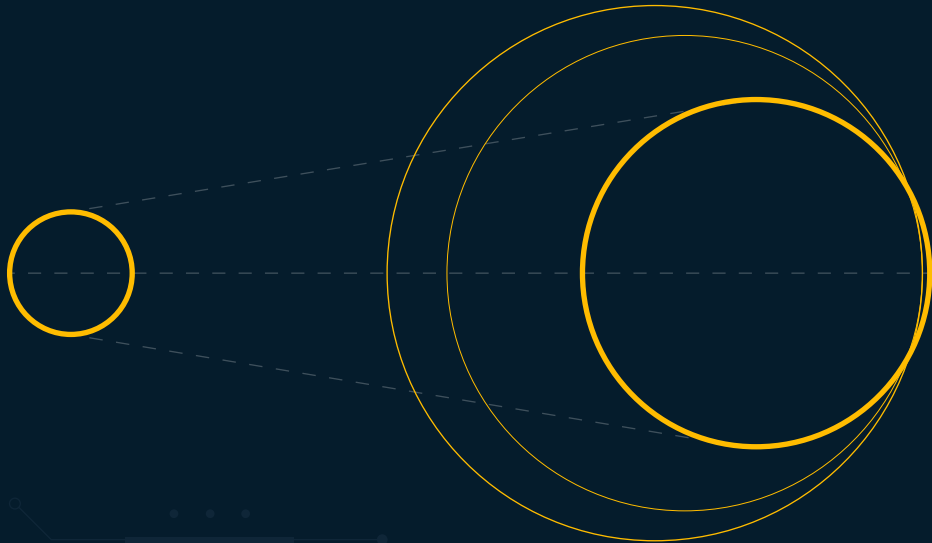
The lack of automation is a hindrance to company growth. Without automation, our software, sales, and data teams wouldn't think the accounting group could accelerate the company's growth. With automation, everything works together, and growth happens faster.



Mark Lewis
CFO, LockerDome

Hunter Paletsas

CFO, GoDigital Media Group



05 Building Resiliency

Within the Finance Organization

The pandemic greatly impacted the office of finance and amplified the need for digital transformation across all operations. To build resilience, finance leaders are improving data visibility to uplevel their cash flow processes.

No matter who your owners are—family, a venture capital firm, a private equity firm, or a public company—you're going to be measured by your cash on cash return. You need visibility into cash flow.

Jeff Epstein

Operating Partner, Bessemer
Venture Partners



Today, senior finance leaders are building a global payables strategy that supports long-term growth and scale. Finance leaders align with this vision.

Sarah Spoja

CFO, Tipalti



When we talk about finance, cash flow drives business growth. The finance organization is so much more than counting credit cards and logging numbers. We spend time as a company coming up with our values, marketing, and telling the world about what we believe.

Carlos R. Vega

CEO & Co-Founder, Tesorio



While top-line growth and profitability is a focus, cash flow is also a massive priority. Putting specific bonus targets on cash flow performance is critical for companies.

Greg Henry

CFO, Couchbase



06 Implementing

The Ultimate FinTech Stack

High-velocity companies are turning to technology for their finance operations. With digital solutions dominating the industry, companies are implementing the most modern tech stacks to propel their business forward.

Adding the right software for your finance operations is critical to long-term success. The six main pillars you should look for are auditability, long-term scale, efficiency, risk management, enabling of talent, and crisis management.



Sally Eaves

Emergent Technology CTO,
Keynote Speaker, & Author

I can't say it enough—scaling is at the essence of a hyper-growth tech company. New, tech-savvy talent can build the infrastructure because they understand systems and enjoy technology.

Marc Balcke

Corporate Controller,
Noom



The ultimate tech stack requires extensive planning as your company scales. When you build a tech stack, don't look for today—look for surrounding regulations that impact and scale with your business.



Sanjeev K. Singh
CEO & Founder, Zenwork

07 Planning for a Successful IPO

A company's IPO journey should start years ahead of when they plan to go public. Businesses need to be armed with a strategic finance organization and secure controls to prepare for a successful IPO.

The CFO's role is to ask, what is our story? What's the end message, and how does it relate to the financials? How do you sell to investors and analysts, so they feel confident about the IPO?

Jim Loughmiller

Senior Managing Director,
CBIZ ARC Consulting



This is what you need to accomplish to go public—a strong, established business strategy, a management team that can execute that strategy, and a company culture that is ready to be public.

An IPO can be one of the most highly-orchestrated events a company goes through and requires extensive effort from a host of employees, executives, and advisors. The CFO has to think about their financial house, partnerships, and how to be successful outside of finance.

You're entering into this brave new world, and it can be daunting. Make sure you have world-class advisors, great bankers, great auditors, and sharp accountants, so you have a smooth IPO.



Adam Bain

Co-Founder & Managing
Partner, 01 Advisors



Sarah Spoja

CFO, Tipalti



Jack McCullough,

Founder & President, CFO
Leadership Council

08 Scaling for the Future of Finance

Hybrid work will be critical for attracting and retaining diverse talent. Finance leaders are making this transition by implementing technology that enables their finance team to take on higher-value, strategic initiatives.

We focus on how we can empower our employees to not only do their jobs but see what's coming. The foundation of the business is numbers, and the finance team represents those numbers.

There is a new lens—a company's financials are the outputs of the strategy and the operational execution. Businesses are looking at statistics that lead to underperformance and are correcting them.

Rob Castaneda

CEO & Founder,
ServiceRocket



Alex Cedro

VP Finance,
Tipalti



Finance roles are evolving. This evolution enables new employee development methods and empowers them to become the next generation of digital-savvy finance professionals.

Helen Yu

CEO & Founder,
Tigon Advisory





Is Your Finance Team Optimized for the Future?

Illuminate, our annual Finance User Conference, is focused on providing resources to help propel your business forward.

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