

why manage change when you can lead it?



Create strong roots that refine and transform your finance and accounting function, maximize profitability, and give your team a competitive edge.



Name:

Company:

What drew you to meet with OTB?

What issues are most critical for you and your business today?

Of the following services:

- Finance Transformation
- Internal Controls and Risk Advisory
- Business & Team Effectiveness
- Post-Merger Integration

which one is most interesting to you, and why?

Building strong roots and seeking development opportunities allows businesses to stay competitive while helping them adapt to external conditions, grow strategically, and sustain long-term success. This exercise is designed to create more mindfulness around the health of your business and identify opportunities to take charge, lead change, and unleash your potential.

BUSINESS HEALTH CHECK	STRONGLY AGREE	AGREE	DISAGREE
Our business has a clearly defined mission.			
The growth of our business is in alignment with our short-term objectives and long-term strategy.			
The profitability of our business is healthy given our short-term objectives and long-term strategy.			
KPIs are in place at the corporate level.			
Clear objectives are set at a department level.			
Individual KPIs are set and tracked.			
Our organization's decision-making, learning, change management, and implementation processes meet our needs and support our strategy and objectives.			
Internal structures (activities, tools, controls, and processes) effectively support execution of our organization's strategy and achievement of our objectives.			
Our company has the skills and capabilities to meet our objectives.			
Our culture effectively supports the execution of our organization's strategy and achievement of our objectives.			
My team is engaged and motivated.			
I, as well as my team, fully understand the mission of the organization and how our actions contribute to its success.			
People feel psychologically safe to talk about problems and opportunities.			
The rest of the company is engaged and motivated.			
The organization works as an aligned team and is not siloed between departments.			
We are effectively managing externally-driven change (such as regulatory changes or a changing business landscape).			
We are effectively managing internally-driven change (such as a new corporate structure or preparing for a merger or acquisition).			
We are using our cash efficiently and have adequate sources of funding to execute our strategy.			
Our return on invested capital exceeds our cost of capital.			

A DIRECTION WITH POTENTIAL

1. What is your strategic focus as a company right now?

2. What is the organization's mission?

3. Write down the immediate and short-term priorities in your organization and in your department:

ORGANIZATION	DEPARTMENT
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

4. As a company and unified team, do you embrace this direction and how committed is everyone to achieving it?

5. Over the next three years, what external factors may challenge your team's ability to achieve its strategic priorities? List 3-5 impediments:

1.

2.

3.

4.

5.

6. Internally speaking (systems, skills, capabilities, culture, etc.), what is holding your company and your department back from accomplishing these strategic priorities? List 3-5 impediments:

1.

2.

3.

4.

5.

BALANCING DIRECTION WITH ENGAGEMENT

7. How is your team different from the rest of the company?

8. What is your personal priority for your department this year?

9. What is your most important professional goal this year, as an individual?

10. How is your role changing?

11. Is your team's "metabolism" generating or consuming energy?



BOLD ENOUGH TO CREATE SUSTAINABLE CHANGE

12. What opportunity do you think your business and/or department must capitalize on?

13. How would you like to see the status quo change within your company and your team?

14. What key aspects of your current state do you want to keep no matter what?

15. What resources and/or new capabilities would you need to meet your strategic priorities or take advantage of the opportunities identified?

16. Are your company and your department prepared for change?



OTB
ADVISORY

Our mission is to drive positive change by blending complex technical finance and accounting services with a people-centered approach that prioritizes trust, respect, and responsibility. We do this by giving more organizations access to leading accounting and finance advisory services and pairing them with transformational change management.