



Finding Common Ground in a Shifting
Economy:
When Membership and CFO's Unite!
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Connecting Great Ideas and Great People

Decision-making for the CFO (Rob Batarla)

If you are trying to get a CFO to make a
decision, here are some things you will
need:

- Data
- Complete Information
- Bigger Picture
- Fiscal & Non-fiscal Implications
- Other



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Decision-making for the CFO (Rob Batarla)

“Don’t assume that your CFO will
always say “no” to spending
money

- CFO’s see the association as a whole and help to prioritize spending
- Solid and complete data can make the dialog with your CFO much easier



CFO’s Should Educate the Membership Department (Susan Medick)

- Explain why your needs and procedures are important to internal controls and year-end audits
- Include membership in budget discussions that will ultimately affect their job duties



CFO's Should Get to Know the Membership Department (Susan Medick)

- Visit members at their place of work
- Attend/participate in a cause or event
- Stay informed by reading industry trade publications



Seven Strategies for Membership and the CFO to Unite (Andrew Goldschmidt)

- Build a relationship with your CFO
- Be proactive with membership numbers
- Understand that your CFO also acts as a "risk manager"



Seven Strategies for Membership and the CFO to Unite (Andrew Goldschmidt)

- When proposing new programs, plans or initiatives to your CFO, make sure you have A, B and C contingency plans prepared
- Be creative when proposing membership ideas that need significant start up investment



Seven Strategies for Membership and the CFO to Unite (Andrew Goldschmidt)

- Understand that CFO's like to "beat figures"
- Realize that Membership and CFO's won't always see eye to eye but that doesn't keep the association from uniting compromise and success



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