

# Integrative Intelligence: A Framework For Finance

Bryan Lapidus

Director, FP&A Practice, Association for  
Financial Professionals



# Meet your speaker

Bryan Lapidus, Director, FP&A Practice  
Association for Financial Professionals

Bryan Lapidus has more than 20 years of experience in the corporate FP&A and treasury space, working at organizations like American Express, Fannie Mae and private equity-owned companies. At AFP he is the staff subject matter expert on FP&A, which includes creating and curating content to meet the needs of the profession and membership. Bryan also manages FP&A Advisory Councils in North America and Asia-Pacific that act as a voice to align AFP with the needs of the profession.



## AFP Membership

---



- › Not-for-profit, member-directed professional society for 16,000 corporate finance professionals.

## AFP Learn

---



- › Live and online instructor-led group training customized to your team.

## Certification

---



CERTIFIED  
TREASURY  
PROFESSIONAL



CERTIFIED CORPORATE  
FINANCIAL PLANNING &  
ANALYSIS PROFESSIONAL

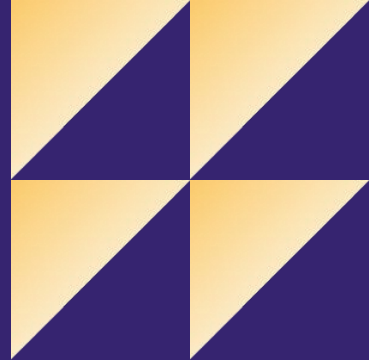
- › Earned by more than 35,000 individuals in 54 countries since 1986.
- › 83% of Fortune 500 companies employ CTPs.
- › Sponsor of the Certified Corporate FP&A Professional (FPAC), which has over 1,000 credential holders and candidates from 64 countries since 2014

## AFP Events

---

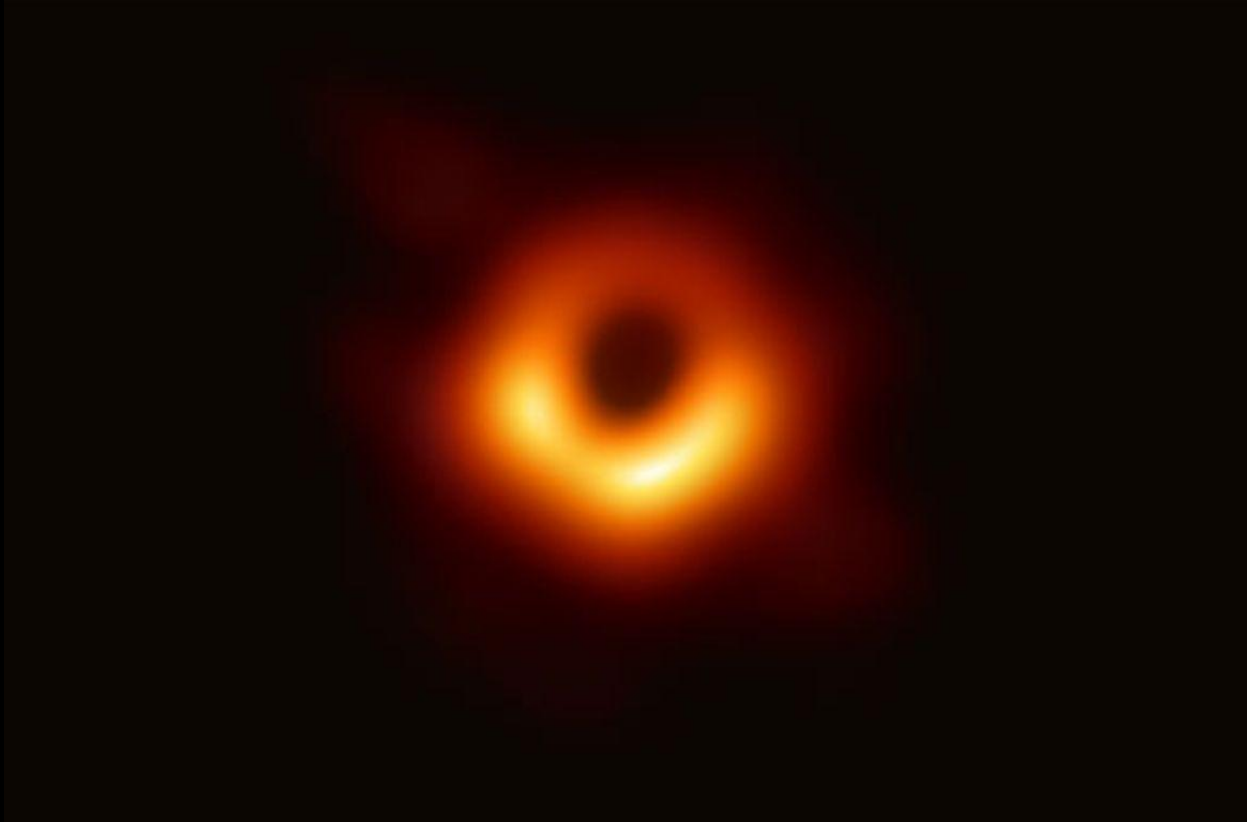


- › Be part of AFP 2022, the annual conference for finance and treasury professionals, draws nearly 7,000 attendees and offers 130+ educational sessions.



How do you see a  
black hole?

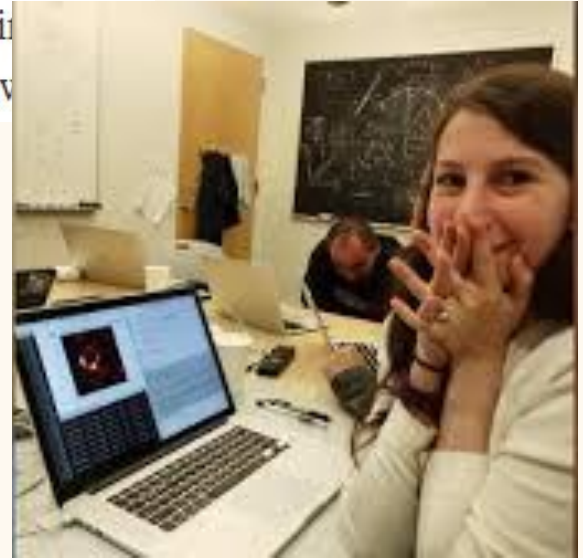
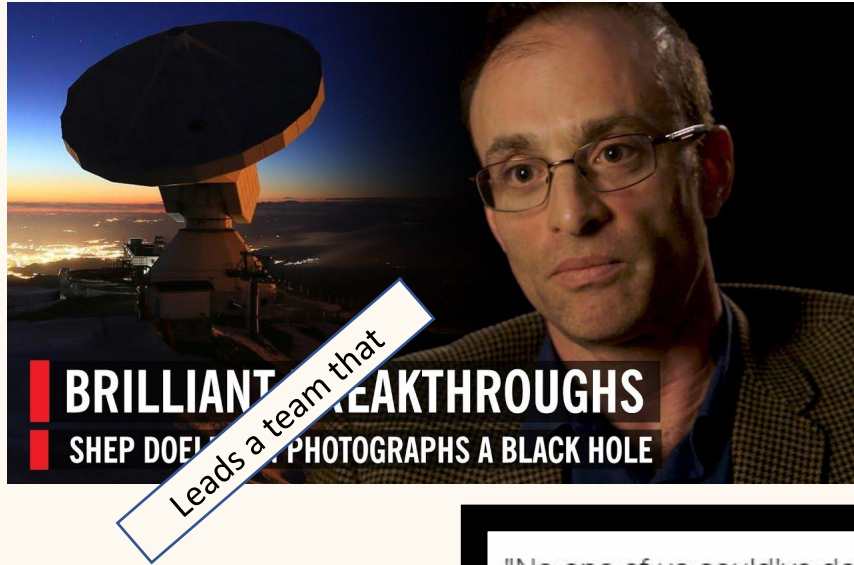




# A really big telescope



The results were announced simultaneously at news conferences in Washington, D.C., and five other places around the world, befitting an international collaboration involving 200 members, nine telescopes and six papers for the Astrophysical Journal Letters. When the images and gasps, follow



"No one of us could've done it alone," Bouman said. "It came together because of lots of different people from many backgrounds."

# Integrative Intelligence is creating value from disparate data and people by...



...creating the right work

...that optimizes an extended team.

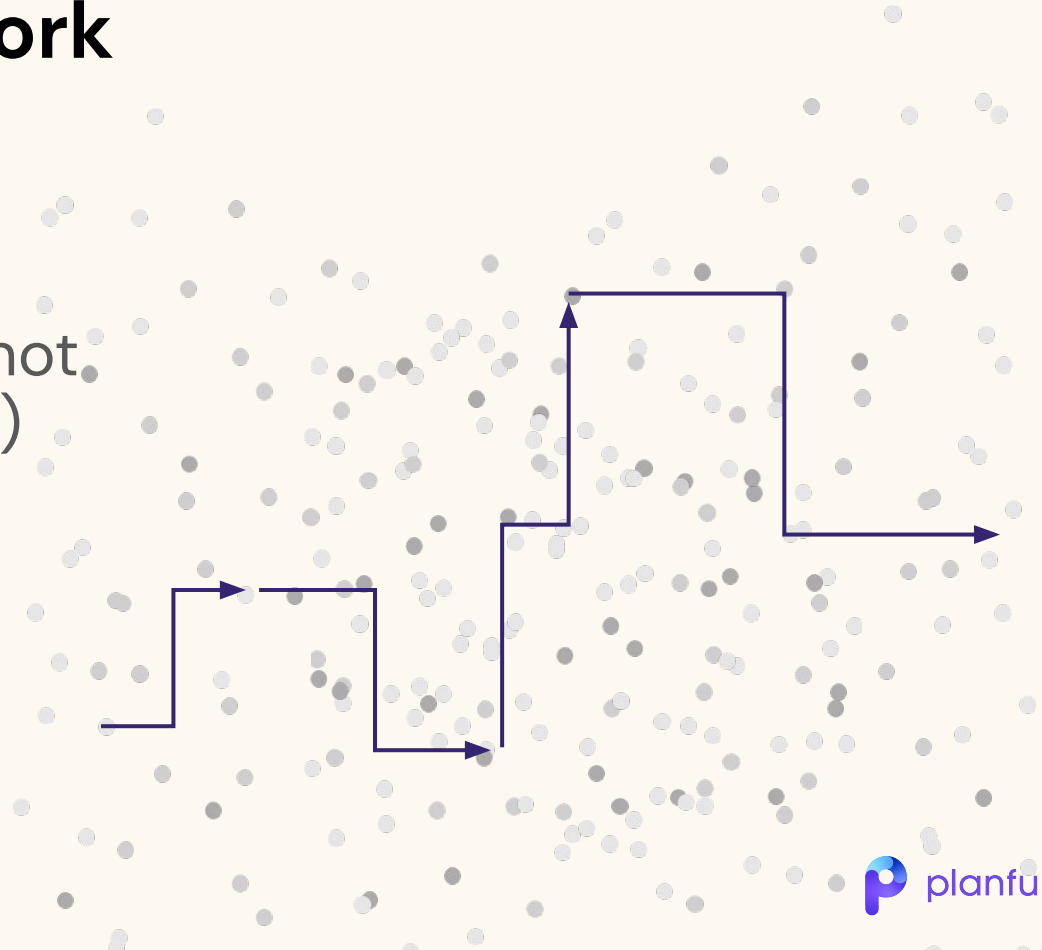




# Create the right work

More data, less clarity

- ☐ Ask good questions
- ☐ Define the outcome, not the path (tools, process)



# Create the right work

More connected, less connected

- Define shared value



# Create the right work

More automation

- Add value beyond having data



# Create the right work

More speed, less foresight (VUCA)

- Build with modularity and optionality
- Get around the question-data-decision wheel quickly



□ Build with  
modularity and  
optionality

“One of the things that works best in data is iteration. Don’t think you are going to get your data right the first time. Everything is about repeating the process as fast as you can.”

–Gauthier Vasseur, UC Berkeley

# Integrative Intelligence is creating value from disparate data and people by...



...creating the right work

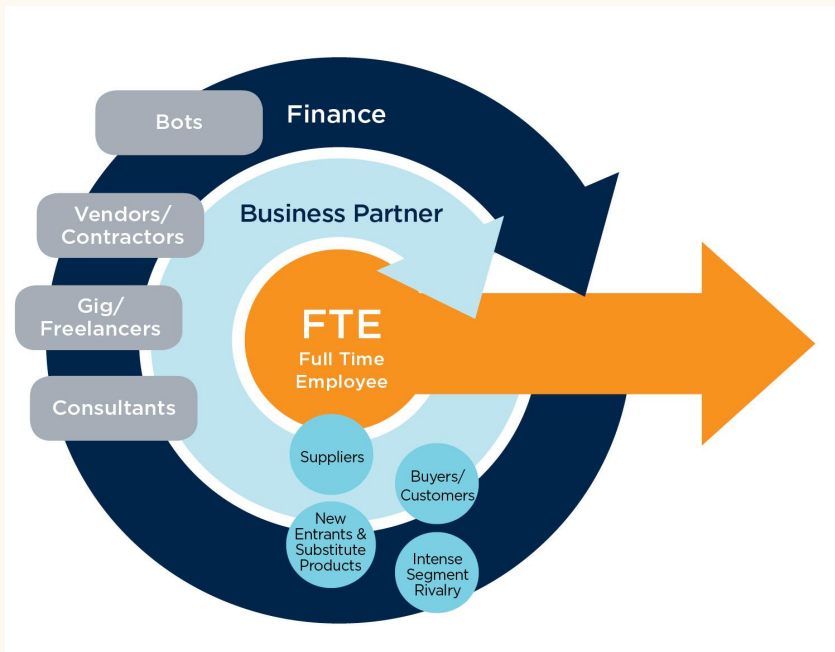
...that optimizes an extended team.



# Optimize the team

More connected, less connected

□ Expanded view of the team



- Anyone who adds value: information or input relevant to a decision can be considered a contributor.
- Anywhere.

# Optimizing the team

"Teaming" is a required skill

- Create transparency





# Optimizing the team

"Teaming" is a required skill

- Maximize your extended team



# Optimizing the team

"Teaming" is a required skill

- Cultivate collaboration & psychological safety



# Optimizing the Team

"Teaming" is a required skill

- Project management



# Optimizing the team

Finance is the steward of company capital

- Provide effective challenge



## Finance's integrative role:

Finance has methods for thinking through an uncertain future and quantifying our thoughts and decisions.

We bring strong analytical frameworks and analysis to the table. We think through a series of cash flows in the future, show the inflection points, and what we believe are the options and outcomes.

We instill that discipline, and we are also creating risk and control points.

**—Rob Trippe, corporate finance advisory**

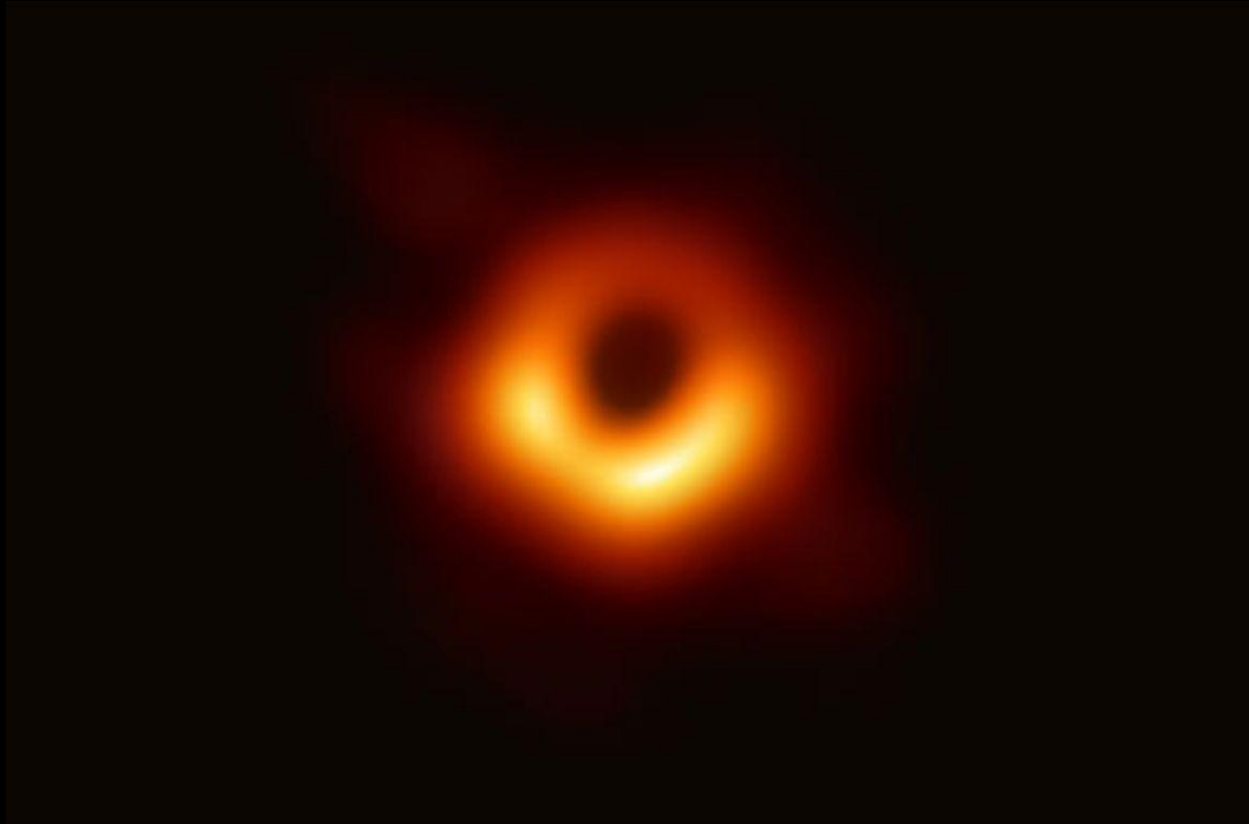
# Success is not guaranteed

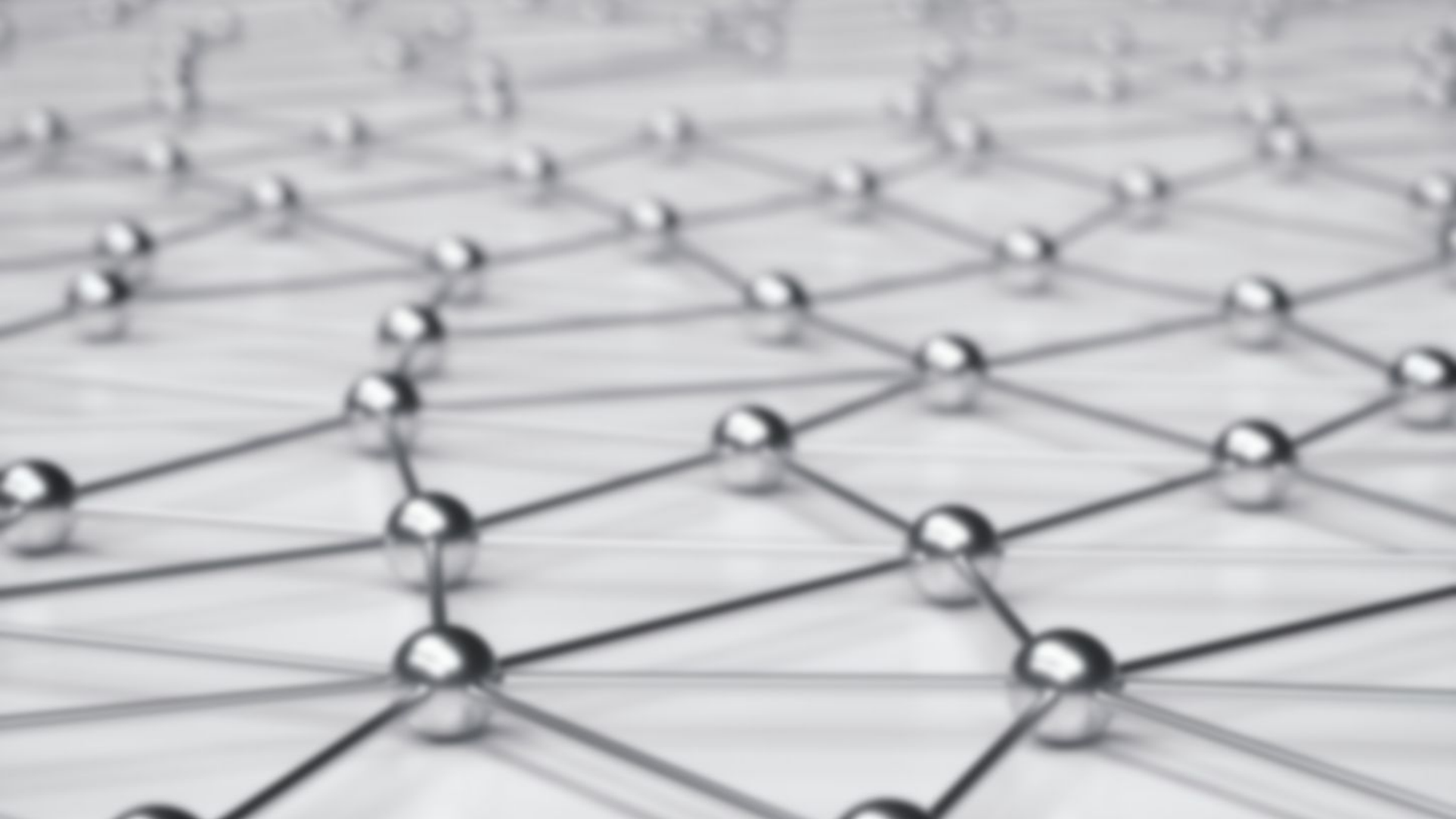
Opposite of integrative intelligence:

- Siloed data
- Siloed people
- Siloed work
- Underinvestment in the above

□ Limited finance role:

Compliance, reporting, cash management







## Create the right work

More data, less clarity

- ☐ Ask good questions
- ☐ Define the outcome, not the path (tools, process)

More connected, less connected

- ☐ Define shared value

More automation

- ☐ Add value beyond having data

More speed, less foresight (VUCA)

- ☐ Build with modularity and optionality

## Optimize the team

More connected, less connected

- ☐ Expanded view of the team

"Teaming" is a required skill

- ☐ Create transparency
- ☐ Maximize your extended team
- ☐ Cultivate collaboration & psychological safety
- ☐ Project management

Finance is the steward of company capital

- ☐ Provide effective challenge



# Thank You!

## Additional Resources:

- Report online:
  - [afponline.org/integrativeintelligence/](https://afponline.org/integrativeintelligence/)
- Ask me or follow me:
  - [blapidus@afponline.org](mailto:blapidus@afponline.org)

