

How Finance Teams Can Become Great Stewards of Company Data

Darcie Lamond

Rachel Bradley-Haas

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Q&A

Asking Questions



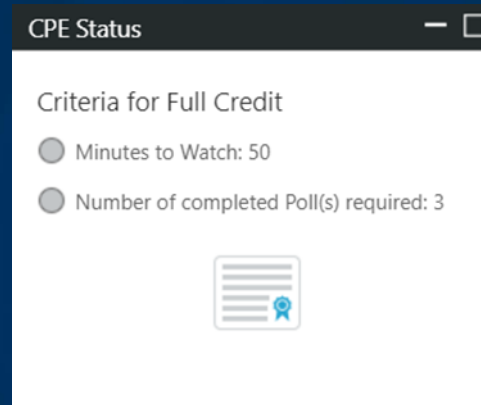
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Moderator

Steve Shannon

**Director of Partnership Marketing,
Business Development**

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Featured Presenters



Darcie Lamond
Director, Brand
Airbase



Rachel Bradley-Haas
Co-Founder
Big Time Data

Darcie Lamond's Biography

- Darcie is the Director of Brand at Airbase and is responsible for content creation and messaging for the company. Her background in finance includes non-profit microfinance and hands-on experience in day-to-day operations, managing payroll, expenses, the ERP, and financial planning.

Rachel Bradley-Haas's Biography

- Rachel Bradley-Haas is the Co-founder of Big Time Data and former Director at Go-To-Market Operations & Analytics at Heroku.
- She is an experienced leader, analytics engineer, and go-to-market operations specialist who despises manual processes and has a penchant for building beautiful data visualizations and dashboards.

Learning Objectives

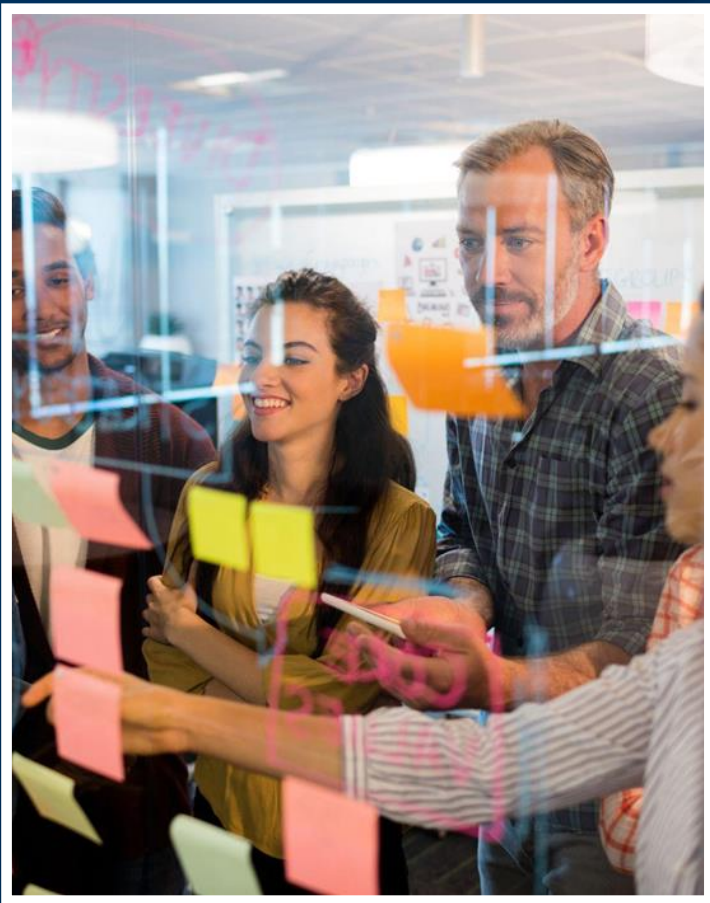
1. Identify some of the best tools for collecting and sharing data.
2. List questions to ask when building data processes and systems.
3. Determine metrics that your company needs to track and ensure they are carefully defined.
4. Identify what to tackle first, second, and third to have the greatest impact.
5. Recognize the value of current and future data maps and how to build them.



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Agenda

- What does it mean to be data-centric?
- Building on top of technical debt
- Sources of data and tools for managing
- Defining metrics
- Data mapping
- Data uses and the cross-functional role of finance



Becoming a Data Centric Company

- What it means to be data-centric
- Timely access to actionable data
- From spreadsheets to AI

Poll Question 1:

What does it mean to be data-centric?

- a. Basing business decisions on reliable data
- b. Building an infrastructure to support the collection of data
- c. Securing tools to report data
- d. Developing models to analyze data
- e. All of the above

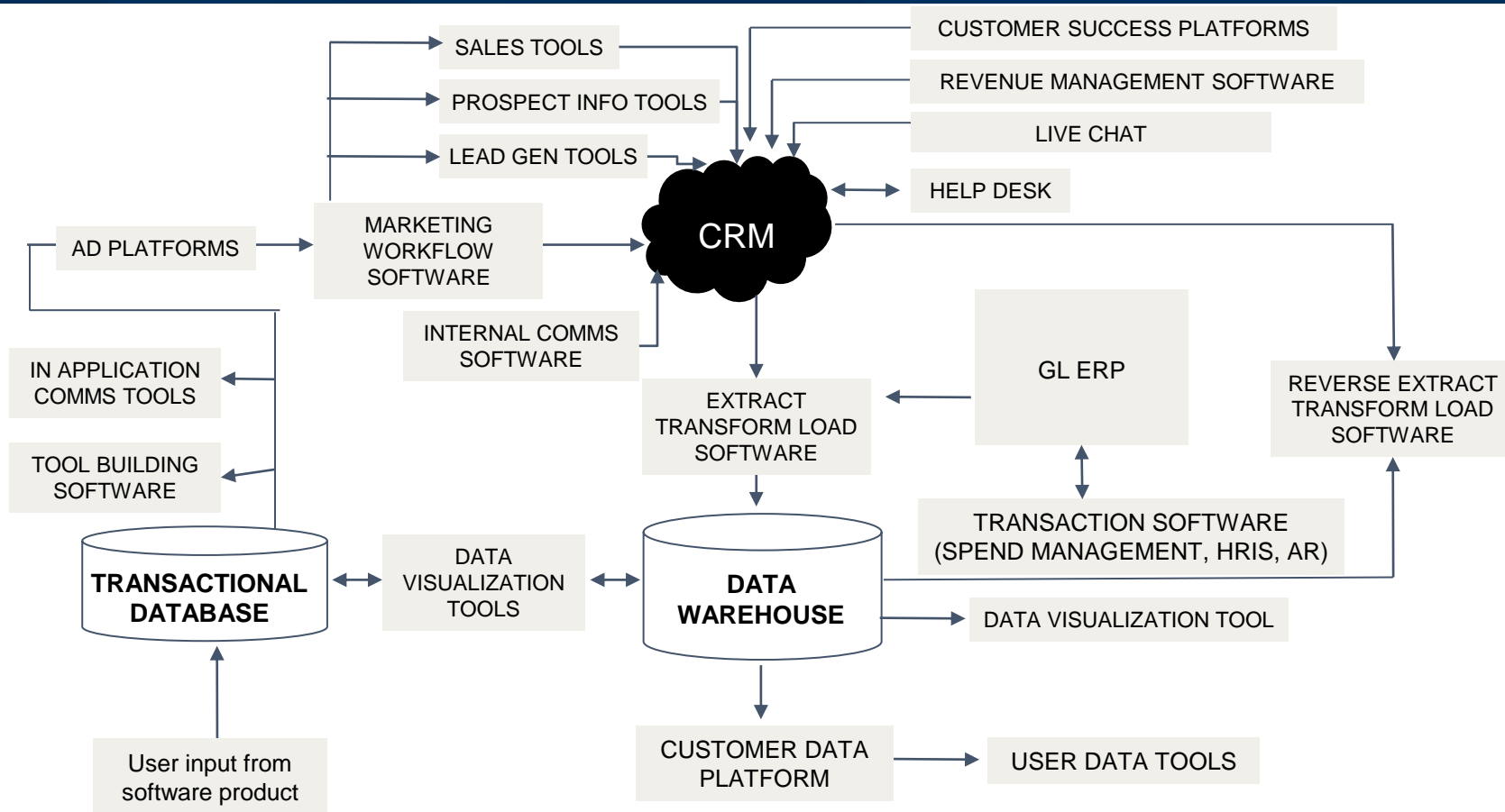
Poll Question 1 Results: (Placeholder)



Building on Top of Technical Debt

- How early stage companies create future difficulties.
 - Trying to run data off production database
 - Missing start and end dates for data
 - Too many tools
- Data is located in many different places.
 - Locating data
 - Where all does it live
 - What logic was applied to it
 - Who owns it
 - Different definitions depending on who is using it

Data Map



Poll Question 2

A data map is used to...

- a. Determine what data you need.
- b. Help define the metrics you want to use for your company.
- c. Show the sources of data and how they connect to your data warehouse.
- d. All of the above.

Poll Question 2 Results: (Placeholder)

Identify and Define Metrics

Defining your terms specific to your company

What are we going to measure ourselves against?

- Bookings
- Revenue
- ARR
- Net retention
- MQL
- Pipeline
- Close rate

Poll Question 3:

Metrics used to assess your business and its progress...

- a. Require precise definitions.
- b. Will have different definitions for different stakeholders.
- c. Are standard for all businesses.
- d. All of the above.
- e. None of the above.

Poll Question 3 Results: (Placeholder)

Where to Start

Identify Stakeholders

- Sales
- Rev Ops
- Marketing
- Department heads
- Leadership team

What data do they need?

- Sales metrics
- Funnel metrics
- ROI and capacity planning
- Business metrics

What tools are necessary?

- Get the right tools for the job
- Eliminate duplicative tools on boarded by different departments
- Standardize definitions and make sure they talk to each other

Poll Question 4:

Which of the following steps are recommended to start building out your data architecture?

- a. Identify stakeholders
- b. Determine the data needed
- c. Assess the tools needed
- d. Involve the board from the beginning of the process
- e. A & D
- f. A, B, & C
- g. All of the above

Poll Question 4 Results: (Placeholder)

Data Warehouse

Tools Exist for Warehouse Management

- Snowflake
- Requires an administrator

Pulling Tables into Warehouse

- Pull source data into a single warehouse
- Standardize definitions and logic between the data pull and the warehouse

Timing and Communication Issues

- Determine frequency across metrics
- Regular updates and the need for real-time data
- Communicate any changes to definitions or segmentations of data to everyone who maintains any of the source data systems



Finance and the Cross-functional Perspective

- Making maps for today and tomorrow
- Asking questions that others don't
- Provide clean data for specific purpose
- Provide insights by looking across functions
- Provide actionable data to decision-makers

Financial Storytelling

- Getting to the “why” behind the data
- Understand your audience and their needs/perspectives
- The push and the pull of data
- Deliver the punchline upfront, it could be all that is needed
- How data can change the story



Poll Question 5:

Would you like to learn more about Airbase Spend Management?

If you check yes, please note that this will nullify any previous requests you've made to IMA to not share your contact information with Airbase.

- a. Yes
- b. No, thank you.

Poll Question 5 Results: (Placeholder)

Questions and Answers



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Thank You to Our Featured Presenters!



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Final Reminders

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- ▶ Please print a copy of the CPE certificate for your records.
- ▶ Your CPE credit will be automatically recorded in your transcript.

Thank you!

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