

# THE CFO MODERNIZATION JOURNEY

FROM CHERRY BEKAERT'S MIDDLE MARKET CFO SURVEY REPORT

See how finance leaders are modernizing for speed and decisiveness. Cherry Bekaert's Finance Modernization CFO Survey Report reveals urgent priorities, strategic shifts, and actionable insights driving finance transformation.

## BEYOND FINANCE

CFOs now go beyond finance, with nearly two-thirds taking on strategic roles.



## CFO TOP PRIORITIES

- 1 Improve Data Quality & Integration
- 2 Optimize Finance Technology
- 3 Streamline Processes

To support their expanded roles, **99%** of CFOs plan to upgrade operations within a year; the next 12 months will be critical for CFOs and their finance operations.

## CHALLENGES OF THE MODERN CFO

Finance modernization efforts are slowed by foundational issues and skill gaps.



Lack of internal expertise



Lack of data integration



Insufficient technical accounting or finance expertise



Forecasting

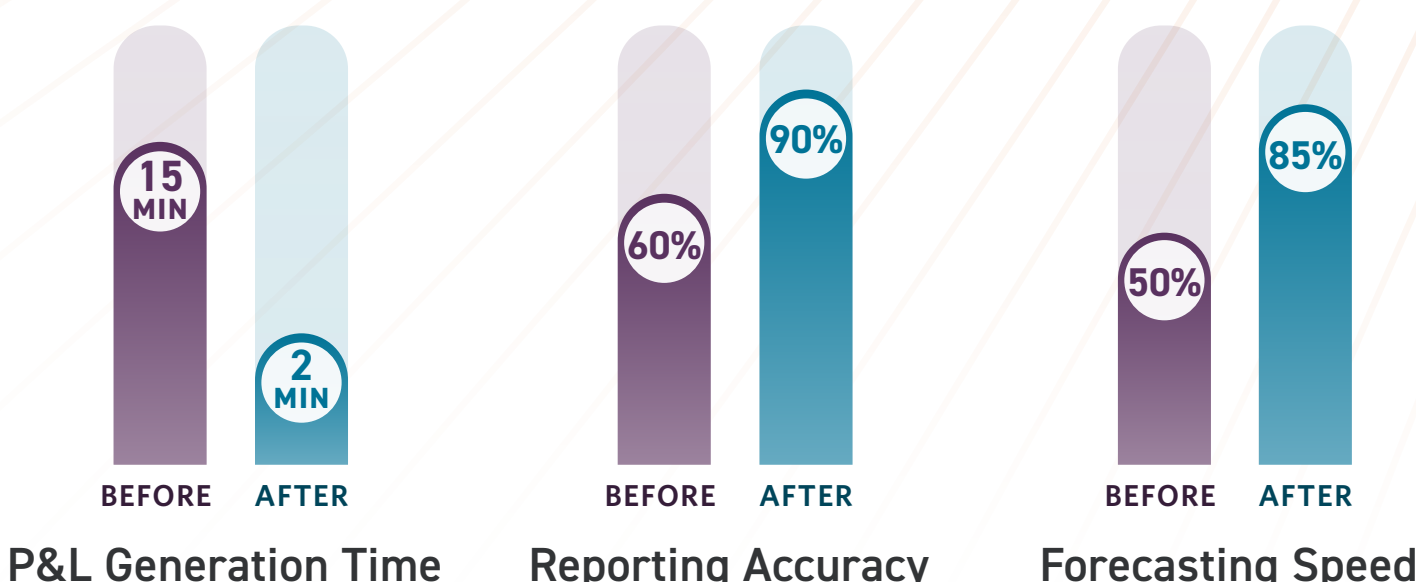


Top talent retention



## MODERNIZATION DELIVERS RESULTS

CFOs report dramatic improvements in speed, accuracy, and strategic capacity after implementing targeted modernization initiatives.



How can you start quickly and build momentum? Cherry Bekaert helps finance leaders improve operations and scale using customized, technology-driven solutions. Download the full survey report to access a 12-action roadmap you can apply in sprints for speed with control.

**Are you ready to modernize?**

**cbh.com/cfosurvey**  
for the full report

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