



Finance-Operations Integration Assessment Checklist

Inspired by Charlie Hunt, Fractional CFO & COO | The CFO Playbook

Is your finance function working *with* operations, or simply around it?

Too often, finance and ops run in parallel, missing opportunities to align, act faster, and build resilience. This checklist, drawn from insights shared on The CFO Playbook podcast with Charlie Hunt, helps you assess how integrated your teams really are and where the next big gains lie.

Whether you are just starting to break down silos or already leading the way, use this to identify what's working, what's missing, and what to prioritise next.

Quick win: *Share this with your operational counterpart and compare results. Some of the best conversations start with one simple question: how do you see it?*

1. Goal Setting & Alignment

- Are finance and operations jointly involved in setting business goals and KPIs?
- Is there a shared definition of success that spans both functions, not just departmental targets?
- Do you regularly review business outcomes together, not just departmental performance?

Quick win: *Start with what the numbers are telling you (cash flow, profitability of team or product, runway), then choose one business-critical KPI (e.g. customer churn, cost per acquisition, time to serve) and map how both finance and ops impact it. Use it to frame joint planning.*

2. Communication & Collaboration

- Are teams encouraged to share insights and risks across functions?
- Is finance included in operational strategy meetings, and vice versa?
- Do you openly discuss trade-offs between cost, time, and performance?
- Ultimately, are your teams learning from each other?

Quick win: *Audit the invitees of strategic meetings. Is someone missing? This isn't about adding more meetings but removing overlap.*

3. Data & Technology Utilisation

- Do teams use a shared tech stack (dashboards, reporting tools, workflows)?
- Is real-time data accessible across both functions?
- Are you evolving how tools are used, or just repeating old processes digitally?
- Are you using 100% of a tool's value?

Quick win: *Legacy tools may still 'work', but if they do not work together, they are holding you back. Identify one workflow where you are still acting on lagging data, look to automate the data feed.*

4. Process Automation & Efficiency

- Have you identified manual processes ready for automation?
- Are digital tools for expenses, AP/AR, and payroll being fully used?
- Do automation efforts consider both finance *and* operations impacts?

Quick win: *Below is a table that shows how automation can help certain functions. Start by getting the fundamentals working efficiently, Automate invoice uploads and coding, push live data into reporting tools, and rebuild outdated spreadsheets.*

5. Team Structure & Skills

- Are roles evolving toward analysis and strategy, not just delivery?
- Are people being upskilled on tech and data, not just finance?
- Is cross-training between finance and ops encouraged or enabled?

Thought-starter: *Upskilling is an issue of time and priority. Where are you asking people to do more, without giving them more capability?*

6. Agility & Resilience

- Can your teams pivot quickly in response to change?
- Are month-end and reporting cycles quick enough for strategic decisions?
- Do you stress-test your models and ops plans with 'what-if' scenarios?

Thought-starter: *Agility is not about reacting, it's about being ready. Review your last three pivots: did finance and ops move in sync?*

7. Cultural Integration

- Do teams seek out lessons from both successes and failures?
- Is continuous improvement rewarded, not just control?
- Do teams understand and respect each other's constraints and contributions?

Thought-starter: *Cultural alignment shows up in how teams talk about each other. Listen for the language your teams use behind closed doors.*

How did you score?

0-6 checked: Plenty of opportunity to align your functions.

7-13 checked: Solid progress. You are aligning, but there is room to deepen integration.

14+ checked: You are operating as a unified, strategic force.

What next?

Pick one unchecked box, can you make it happen this quarter? If it takes under a day, do it this week.

Share the checklist with your COO or CFO counterpart. Use it to guide a joint planning session.

Listen to [Charlie's full episode](#) for more insights

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