

.: abacus

# How To Stand Out:

Stories From 5 Finance Leaders  
On Building A Personal Brand



# Featuring Interviews With:



**Paula Kensington, FCCA**  
Host,  
**CFO Conversations**



**Ronalee Balog**  
Chief Operating Officer,  
**Dore Partnership**



**Alan Federman**  
Finance and Operations Director,  
**Canvas**



**Rob Jacobs, CPA**  
Head of Finance,  
**Bluecore**



**Peter Nesbitt**  
VP Strategic Finance &  
Corporate Development,  
**Unified**

# Personal Branding Generates Opportunity

“It’s not what you know. It’s who you know.”

We’ve all heard the phrase. We all understand there’s truth to it. But ask yourself: would you recommend or hire everyone you know? No way.

Having the right connections is important to advancing your career. But it’s only half the battle.

What really creates opportunity is defining your personal brand to your employer, to your network, to the market. It’s taking that moment when you make a great impression and scaling it to the larger world.

This guide presents different approaches real professionals are using to build their brands. You’ll see tips and strategies that you can use to become an in-demand finance leader, including a system we developed called the **ROLE Model** of personal branding.

In the age of effortless connection, cultivating a personal brand is essential. It’s not just who you know. It’s what they know you can do.

# We Are All Free Agents

At first glance, “personal branding” may not seem like something you need to worry about. You probably associate the term more with celebrities and Instagram #influencers than with serious work like accounting and finance.

And yet, there’s a good chance you’re engaged in personal branding already.

Got a LinkedIn profile? Congrats—your resume is permanently online, available for the world to see. That’s part of your personal brand. So is the work you announce to your professional network and the cat videos you share on Facebook.

In the age of social media, each of us has a personal brand. That means each of us is subject to the golden rule of public relations: Control your brand or someone else will.

Finance can no longer overlook the need for personal branding. In our field, the isolated number cruncher is evolving into a prominent, forward-thinking strategist. Whether you’re looking to move jobs or move up in your current role, developing a personal brand communicates your value to your network as a whole.

No longer will your skill set be confined to the people you interact with every day. Your value will be public knowledge. You’ll be a free agent, ready to offer your services to the highest bidder.<sup>1</sup>

<sup>1</sup> “BRAND OR DIE: The Downfall of the Institution and the Rise of the Personal Brand.” Nanton and Dicks, *Fast Company*.



## IN CONVERSATION: **Paula Kensington**

Fellow Member of the Association of Chartered Certified Accountants  
Host, *CFO Conversations*, Winner, 2013 CFO of the Year Australia,  
Thomson & Reuters

*By mid-2018, Paula Kensington had built an impressive career in finance. After completing ACCA certification in her native UK, Kensington rose through the ranks at various finance departments in Australian companies, culminating in her winning CFO of the Year in 2013. Years later, Kensington decided to launch a web series called CFO Conversations to create a venue in which finance professionals could share leadership advice. One notable bit of wisdom: every one of us needs to cultivate a personal brand.*

### **What led you to start advising finance professionals to develop a personal brand?**

It started when I won the award back in 2013. That really changed my way of thinking. I suddenly realized, "This is how the outside world sees me." I think a lot of us go about our work looking for external validation, but we never take the bull by the horns. The truth is, there is a way to control the world's perception of you, and it is very important to your success. That's what personal branding is about.

## What is a personal brand to you?

Coming up with a personal brand means defining, for people inside and outside your company, what it is you can do. Where your passions lie. What your value to the business is and could be. A personal brand is a three-dimensional version of your resume.

## So aren't finance professionals building personal brands every day in their work?

Not necessarily. Plenty of us still work like we did fifteen years ago: isolated, being the introvert, just adding up numbers. That's not going to be a viable strategy anymore. CEOs and boards of directors are looking to us not just to be a source of truth, but to provide governance and operational advice. The role of a finance professional is much more forward looking now. After all, if nobody knows what you're doing, you're invisible. You have no power to leverage going forward.

## Why now? What's changing?

Well, everyone's worried about future-proofing themselves. Accounting and finance people know a lot of our work is being automated, but I don't think we're good at humanizing ourselves. We're good at numbers. We're analytical. We're not good at thinking about, "How do people see me?" But in a digital world, your personal approach is your DNA. It's what you take with you, no matter if you're looking to move up in your current role or to another company.

## How do you recommend starting to build a personal brand?

Self-reflection. You look at what you've achieved. A lot of us have done more in our careers than we realize at first, because we're taught to not puff ourselves up. So start by viewing your career through that lens: "Actually, I did do that. We did set up a new team, we did introduce governance here, we did take share price from four to fifty four cents." And then see how those successes dovetail with what you're interested in, and how that adds to the business. The key is to help others understand what you're good at.

**"A personal brand is a three-dimensional version of your resume."**

## How would you describe your personal brand?

I want people to think of me as a strategic leader with a heart. Someone who cares about people but has a business sense. I want to be seen as someone who strengthens a leadership team by being ambitious and confident. Not just a finance leader, but a business leader. I believe that's where the CFO position is going.

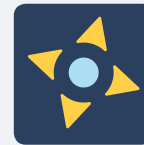
# The ROLE Model Of Personal Branding

Think of personal branding as a blue ocean strategy: a way to move away from competition, into a niche specific to your goals and your skill set. To stand out from the crowd, develop these four components of your personal brand:



## Reach

How many people know and are exposed to your personal brand. Think about it not in terms of fame or showing off, but in terms of visibility versus invisibility.



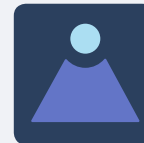
## Outlook

Your view on industry developments, trends, etc. The things you're interested in learning about.



## Leadership

The elements of your personal style—your disposition, demeanor, feedback preferences, etc—that indicate the kind of professional you are today, and the kind of leader you want to be.



## Expertise

Your skill set. The experience you have, the results you've achieved, the areas in which you specialize and stand out.

**Together, these elements comprise the ROLE Model of developing a personal brand. Let's look at each up close.**

## ELEMENT 1:

Reach  
Outlook  
Leadership  
Expertise

# To Boost Your Brand, Grow Your Network

You could have the most impressive personal brand anyone's ever seen. But if the only people who know you happen to work in your office, you're invisible.

Become in-demand by building your network. Engage with and develop a community on social media and in person; it extends your knowledge base and amplifies every other aspect of your personal brand. Plus, it pays dividends when looking for advice or new roles.

**85%** of jobs are filled via networking.

The Adler Group, 2016<sup>2</sup>

<sup>2</sup> "New Survey Reveals 85% of All Jobs are Filled Via Networking." Lou Adler, LinkedIn Pulse.





IN CONVERSATION: **Alan  
Federman**

Finance and Operations Director, Canvas

*Over the past decade, Alan Federman has earned a reputation as an expert at setting up finance infrastructure at early stage companies. ClassPass, Patreon, and a number of other companies have laid the groundwork for growth by bringing Federman aboard at a critical inflection point. Along the way, Federman has built a strong network of references that have maintained a high demand for his services.*

**How did you develop this brand as a  
“startup whisperer?”**

It started about a decade ago. I had worked at very large companies—Arthur Andersen and Viacom—and I never felt truly connected to the companies I was working with. One day I discovered a company called The Ladders, and I said, ‘Wow, this is what I really like doing.’ It was a revelatory experience. I joined the company and it began to scale. That was when I realized that I liked to get into companies at an early stage.

## What role does networking play in how you find opportunities?

That term “networking” always sounds to me like I’m at a mixer with my name tag on. But yes, I’m lucky to have references who connect me to companies that might need my help. I meet a lot of people by helping to get their companies off the ground. I’ll get a call asking if I want to set up the finances for a new project, and if I’m able, I’ll usually do it for free. Just to help out. When those people hear of the need for someone who can start up a company, they might pass along my name. It’s not a strategy per se, but it has been helpful.

**“I help founders understand that finance infrastructure, at an early stage, is every bit as crucial as engineers.”**

## What does your network allow you to do?

It affords me a lot of flexibility. I was part of one company that had to cease operations, and it was partly due to those references that I wasn’t in the job market for long. I’ve also had to move around a fair bit due to my wife’s work: from Boston to New York and now to San Francisco. Each time we relocate, I’m able to get connected with a great company like Canvas, which is where I work now.

## How are you able to signal your value to your professional network?

I just help founders understand that finance infrastructure, at an early stage, is every bit as crucial as engineers. That whatever you might save by not setting all that up early will cost you more in the long run. You’ll struggle with compliance issues, you won’t have the reporting you need to go out for funding, and so on.

Also, I try to complement the company leaders: to bring something to the table they don’t, and manage something so they don’t have to. The highest compliment I can get is when a CEO tells me, “This is something I don’t have to worry about.”

## How would you describe your “personal brand?”

I think I’m known as someone who enjoys the chaos, honestly, of startup life. In this sector—and it almost is a sector unto itself—you need a high tolerance for uncertainty. You really gotta know your stuff. Decisions get made fast. If they say, “We want to spend \$100,000 on this,” you can’t say you’ll get back to them in three days. You need to be agile, adaptable. It’s not for everyone, but if you enjoy being able to feel the impact of your work, it’s the best kind of environment.

# How To Extend Your Brand's Reach

- Go to conferences in your area and actively meet other attendees. There's no replacement for networking in-person.
- Seek out and meet leaders at the level you wish to be, like CPA partners and members of boards of directors.
- Use social media to connect with finance experts in your geographic region.
- Join finance and accounting forums and industry groups on LinkedIn.

## EXTRA CREDIT

**The high performer swap.** Find a peer with whom you're particularly close and introduce one another to the highest-performing members of your respective networks.

## ELEMENT 2:

# Reach Outlook Leadership Expertise

## Broadcast Your Development

Technology is changing finance and accounting in unpredictable ways. Right now, smart organizations are hiring and promoting finance leaders working to become future-proof.

Demonstrate your ambition and adaptability by putting learning at the center of your personal brand. Read and repost articles you find interesting. Express opinions. Use your personal brand to show off your long-term outlook and differentiate yourself from people mired in the work of today.

**77%** of CFOs take responsibility for driving technological change.

Accenture<sup>3</sup>



<sup>3</sup> "How CFOs Can Fuel The Growth Of The Digital Enterprise." Accenture research brief.



## IN CONVERSATION: Peter Nesbitt

VP Strategic Finance and Corporate Development, Unified

*If there's one constant to Peter Nesbitt's career, it's learning his way around a new environment. After serving in the US Army, Nesbitt did stints in the public sector, including on Capitol Hill, before moving to private equity and investment banking. From there, he went in-house at Bit.ly and, presently, Unified, to master the art of strategic finance. At each of these junctures, Nesbitt proudly demonstrates himself to be a passionate, committed learner.*

### **Describe the learning curve in transitioning from banking and PE to in-house finance.**

It requires becoming fluent in a bunch of different disciplines across the business and the industry. Strategic finance is really about enabling business leaders to make better decisions, so you need to understand the structure and details deeply enough to translate them to numbers. In PE or investment banking, financial modeling is generally not that detailed. Understanding a business in the weeds is much more challenging than at a higher level.

## How do you develop that fluency?

I read a ton of blogs, stuff on Medium, some content marketing. I create PDF versions of around 75% of what I read and keep them in a (somewhat organized) library. It's coming in handy now, actually. I'm onboarding someone, and when they ask me about CAC to LTV ratio or something, I go, "Here's thirty articles I found helpful." That all helps with the learning curve.

**“Talking to other leaders is really helpful. Not only do I learn from their experiences, but I can articulate things I’ve learned and test them out with other people.”**

## How do you demonstrate the fact that you're learning about the business and industry?

Mostly I think it's present in the conversations I have, in the advice I give. I also post everything I read to LinkedIn. It's a pretty eclectic reading list—everything from fundraising to sales & marketing strategy to product development—but it allows anyone who follows me to see what I'm keeping up with. It's not "Hey look at me, I'm learning stuff," so much as it's me hoping that other people read it too, because I think it's something relevant we could connect on. And, you know how you can tell who engages with your posts? Half the time, it's people from my company. So it's working.

## Why did you choose to become a part of the CFO Leadership Council?<sup>4</sup>

Talking with people at other companies about how they solve problems is really helpful. I talk to other VPs of Finance across New York City on Slack, too. Those connections are really helpful. Not only am I learning from other peoples' experiences, but I'm able to articulate things I've learned and test them out with other people. "Hey, I tried this, see if it works at your company."

## How would you describe your personal brand?

There are two ways to view human relationships: From a standpoint of scarcity or abundance, zero-sum or positive-sum. I try to create an environment of abundance. In my own career, people have been more willing to help me because I've been open to helping anyone who needs it. There's not necessarily a dollar value at the end of it, but the fact is, creating that culture of abundance is more important. Down the line—next time I'm trying to immerse myself in something new—it'll have value in a tangible way.

<sup>4</sup>A national professional organization of CFOs that meets monthly to discuss trending and important topics in finance.

# How To Share Your Outlook

- Regularly share valuable thought leadership and research on social media.
- Engage in conversations. Comment on articles you find valuable, post to forums, use Twitter to chat with influencers.
- Find an emerging technology to become an expert in. Keep up with developments in the space and help others understand them.

## EXTRA CREDIT

**Report on an emerging trend.** Is there a particular technology or sector you're interested in? Write an article about it. Many outlets are happy to publish external contributions; seize the opportunity to show off your analytic prowess and associate yourself with forward-looking trends.



### ELEMENT 3:

Role  
Outlook  
**Leadership**  
Expertise

## Be Fully Human

The more senior you rise, the more important soft skills become. Executives want people who relish responsibility and work well with a team. Your personal brand should evince both.

“Leadership” encompasses more than just managerial ability. It’s about your potential to lead other people with ambitions and motivations of their own. Show off your sense of humor, your personal goals, your high and low moments. Finance’s work in the future will be taken on by complete human beings, so be yourself.

**50%** of CFOs consider soft skills as important as technical skills.

Robert Half Finance & Accounting<sup>5</sup>

<sup>5</sup> “CFOs Seek Finance Professionals With Mix Of Hard And Soft Skills.” Robert Half Finance & Accounting.





## IN CONVERSATION: **Ronalee Balog**

Chief Operating Officer, Dore Partnership

*Over the course of her career—from combat service in the US Army after graduating West Point, to managing a team in GE’s demanding corporate audit division—Ronnie Balog has learned a lot about leadership. In the last few years, she has started to share that wisdom in blog posts. Balog uses her writing to understand her thoughts better, and to communicate the steely, lucid philosophy she earned by shouldering a lot of responsibility at a young age.*

### **What makes you want to write?**

I’ve been interested in writing since I was young. As an adult I picked it up as an exercise. My mother used to say, “How do I know what I mean until I see what I say?” And it’s true: writing is therapeutic, and it’s a form of self-expression, but it also helps you sort out how you feel about something. Putting what’s in your head on paper forces a certain level of rationality. It’s also a way to share my perspective and be understood. In my experience, understanding someone’s viewpoints makes for a much more functional team and organization. When I was at GE, I would always encourage my team to write their own blogs. Many of them took that on.

## **Why did you encourage your employees to write?**

Well, there was a lot of complaining going on. It was a very young demographic on the audit staff, many of them right out of college, working long consulting hours. I just said, “Look, if you have a complaint—if you’re able to articulate a problem—you should have a suggestion.” Writing that out was really a mechanism for clear communication, to help them develop a concept of how they wanted to improve things.

**“Leading up is a lot of your career. Storytelling is an effective way to get your perspective across and influence people above you.”**

## **How does personal writing help team communication?**

It demands both communication and self-awareness, which I believe are two critical life skills. Regardless of what you know or how great you are at what you do, if you can’t convince people, you won’t get very far. At the same time, writing helps you understand your own thought patterns. Even just examining the stories you feel like writing down most: why those stories? Clearly they meant something to you. So, making sense of that. Writing is just as much me understanding myself as people understanding my outlook.

## **Do you ever write for, not junior employees, but an audience above you?**

All the time. I very much believe in the concept of leading up. I commissioned as a second lieutenant when I was 21 years old, and one of the unique things about the military is that you can suddenly find yourself in charge of people twice your age, with twice your life experience. You learn pretty quickly that leading up is going to be a lot of your career, and storytelling is an effective way to get your perspective across and influence people above you.

## **How would you describe your personal brand?**

I think it’s very pragmatic and accountable. Look, sometimes you know the right answer and the person above you, who should know, doesn’t. I consider it my job to do everything I can to influence them and help them arrive at the right outcome. Sometimes that means writing, sometimes it’s a suggestion, sometimes it’s getting others to buy in. I work to influence people above me, below me, anywhere. Storytelling is an effective way to do that.

# How To Demonstrate Leadership

- Keep all your social media accounts consistent, professional, and public.
- Dress and act the part. If your goal is to be seen as a rising professional, be deliberate about presenting that way.
- Volunteer. Participating in a cause speaks volumes about your values—and your ability to manage multiple projects.

## EXTRA CREDIT

**Mentor junior employees.** Perhaps the most valuable repayment of your career will come from investing time helping others. Mentorship expands your network, trains you in the practice of leadership, and might help you understand your own career better.



#### ELEMENT 4:

Role  
Outlook  
Leadership  
**Expertise**

## Show What You Can Do

If a personal brand is a three-dimensional resume, here's the traditional part: your actual skills and experience.

Keep in mind your goal is differentiation, not boasting. Be proud of the results you've achieved, but also own the hard lessons that accompanied your successes. Highlight the diversity of your professional experience. Add context to your achievements, avoid jargon, and be specific.

**35%** of CFOs are CPAs  
Spencer Stuart<sup>6</sup>

<sup>6</sup> "Profile of the Fortune 500 CFO—Today and in the Future." SpencerStuart.



IN CONVERSATION: **Rob  
Jacobs**

Certified Public Accountant  
Head of Finance, Bluecore

*As the Head of Finance at one of the fastest-growing startups in marketing technology, Rob Jacobs is all about growth. He sees his job as helping leaders around the company understand the story behind the numbers, empowering everyone to translate grand visions into realistic plans. Far from cooping up in an ivory tower, Jacobs has built a personal brand rooted in relatability and collaboration.*

**You've worked at large and small companies. How do you view the role of Finance at a startup?**

Founders are generally visionaries with lofty aspirations. Finance's role is making that vision a reality, through ownership of the business model and capital. As you scale a business, there's a balancing act between the business model, financial data, and the vision. That's where I find my role.

## **What's your approach to working with founders who don't have backgrounds in Finance?**

My role is to digest what is happening in the business, educate, and help them make the right decisions to drive the business forward. You have to own the business model and be their right hand. In a world of rapid market changes, a challenging regulatory environment, and global competition, I have to be responsible for more than just finance. My role is a catalyst for growth. Finance is uniquely positioned with financial and operational visibility into all other functions. You have to work with founders to steer the business and be proactively forward-looking.

**“My role is a catalyst for growth. Finance can only add value if leaders can make informed decisions.”**

## **Do you work with other people in the company the same way?**

My role is to understand the composition of the product—the cost to develop, market, and sell—keeping all leaders in the loop. If we're up, down, or flat in our trends, all levels of management need to understand why and how their decisions impact the business. Finance should not be a black box; we can only add value if leaders can make informed decisions that best achieve the business goals.

## **Does being relatable make it harder to say no?**

Finance is typically seen as the “house of no,” but I want it to be a discussion. You have to make sure management understands how and why you came to a decision. To tie requests to the business objectives: “How is this supporting us for the quarter or the year?” These conversations are crucial. To help drive growth, finance leaders must become strategic partners when providing relevant and predictive financial data. If we could predict precisely what's going to happen, we would be in Vegas. You have to be able to audible. So I try to have a conversation for more or less every key decision.

## **How would you describe your personal brand?**

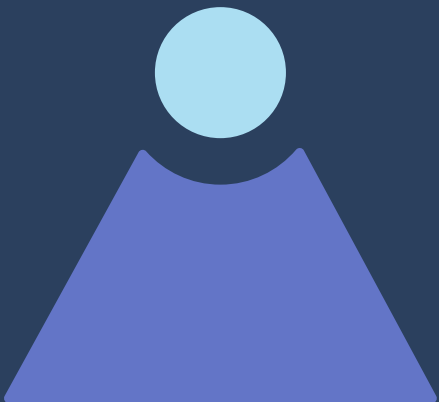
I would say authentic and relatable. Finance is not a binary function in the back office. I partner with my team in the spirit of helping everyone understand the story of what's going on in our business, where are there gaps that may prevent success, and how we close them. That's the cornerstone of how I operate. Reality creates perception, perception is reality. Get rid of the box!

# How To Present Your Expertise

- Keep your social media information updated, including a personal description that applies to your current company.
- Celebrate your wins by posting congratulations to other team members on social media.
- Ask a colleague to write you a recommendation on LinkedIn. If it makes sense, return the favor.

## EXTRA CREDIT

**Translate the numbers.** It may be the best skill in strategic finance: challenge yourself to explain a finance concept—a model you've built, something you did well, a strategic initiative your company is considering—to someone without a finance background. See how well they can teach it back to you.



# Keys To Posting Content

Whether your own or someone else's, posting content for your network to consume is a valuable way to demonstrate your personal brand. Here are some tips to keep in mind.

## Make it personal

Personal branding is much more “personal” than it is “branding.” For as essential as your qualifications are, at the end of the day, people hire people. Let your abilities, interests, and personality shine through your public presentation. Don't worry about inventing new ones.

## Share your learnings

This one is especially important for finance professionals, to whom self-promotion may not come naturally.

People in extroverted job functions, like sales, are expected to go out and broadcast themselves. They're good at it. They like it. Accountants and controllers generally do not. And for good reason; they do serious work. Finance professionals are entrusted with the most sensitive, secure information in the business. Not exactly content you can wave around on social media.

Luckily, you don't have to. Do not post quarterly results or investment outcomes to LinkedIn. Instead, share what you learned

from working through a difficult problem. Make predictions about developments in a sector you find interesting. Be authentic to yourself, responsible to your work, and generous with those hard-won lessons. That's how you demonstrate experience and become a valuable source of insight to others.

**Be authentic to yourself, responsible to your work, and generous with hard-won lessons.**

## Post regardless of your job situation

Personal branding isn't just for job seekers. The aim is to cultivate a public-facing image that exudes influence, vision, leadership, and expertise. There's a good chance your current company is in the market for all that.

Personal branding connects a consistent, deliberate version of yourself, your skill set, and your career goals with the people who can help you achieve them. Even if those people manage you now, make sure they're not the only ones who understand your worth.



# Stand Out And Let Opportunity Come To You

We all know the value of being in the right place at the right time. But we live in an era of instant answers via search engines; of virtual communities on social media.

Right now, we're all in the same place at the same time. Valuable opportunities go to those who stand out and share their full selves in a strategic, deliberate way.

Don't toil anonymously and poke your head out when you're looking for a job or promotion. Instead, cultivate a personal brand continually, and let opportunity come to you.



 [www.abacus.com](http://www.abacus.com)

 [hi@abacus.com](mailto:hi@abacus.com)

 [@abacus](https://twitter.com/abacus)

 New York, NY 10016

