

FINANCIAL & LEADERSHIP CONSULTANTS

CLARITY | STRATEGY | IMPACT

Sample Financial Skills Assessment (FSA) Report

At Financial & Leadership Consultants, we provide customized tools and coaching to help finance professionals grow into strategic leaders. Below is an example of a Financial Skills Assessment (FSA) report prepared for a Financial Manager. This sample illustrates how our assessment process helps identify current strengths, uncover development opportunities, and prioritize learning goals.

Executive Summary

Purpose of the Assessment

The Financial Skills Assessment is a self-evaluation tool designed to help finance professionals reflect on their current strengths and identify areas for professional growth. With a clearer understanding of their skills today, individuals can take intentional steps toward building the expertise they need to lead with confidence.

How It's Used

The FSA is a flexible resource that supports:

- Individual self-reflection and goal setting
- Productive conversations between financial professionals and their supervisors
- Team discussions that align individual strengths with division goals
- Executive coaching and leadership development planning

When to Use It

Because organizations and strategic goals evolve, we recommend completing an FSA annually to monitor progress and re-align priorities.

Snapshot of a Financial Manager's Assessment

This sample is based on an actual FSA completed by a Financial Manager, combined with insights from our coaching sessions. It highlights:

- Areas of deep experience and subject matter expertise
 - Key opportunities for continued growth
 - Recommended resources to support learning and development
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Strengths and Experience

This FSA covers 63 core finance topics. In this case, the Financial Manager reported 4–5 years of experience—indicating subject matter expertise—in 26 areas. These strengths included:

- Financial Accounting & Reporting
- Budget Development & Forecasting
- Grant Management
- Long-Term Financial Planning
- Team Leadership and Supervision

This individual demonstrated strong capabilities in communicating financial data to non-financial leaders, managing audits and compliance, leading teams, and developing complex financial forecasts—skills essential to supporting their team and advancing organizational goals.

Growth Opportunities

The assessment also revealed areas where the Financial Manager had limited (0–1 years) experience. These centered on:

Operating and Capital Budgeting

- Developing cost driver assumptions
- Validating indirect cost rates
- Forecasting pension and OPEB costs
- Monitoring capital project budgets
- Developing budgeting policies and methodologies

Financial Management for Emergency Events & Disaster Recovery

- Creating emergency event budgets
- Managing post-disaster cost recovery
- Tracking emergency-related expenditures
- Serving as finance lead during emergency events

Advanced Leadership and Communication Skills

- Presenting reports to elected officials
- Collaborating with external grant agencies and funding partners
- Conducting and reporting fiscal health assessments
- Integrating long-term plans (e.g., IT or asset strategies) into financial planning

These are natural areas for development for a finance leader stepping into a more strategic or public-facing role.

Focus Areas for Development

Based on the assessment and coaching conversations, we recommended the following priorities for continued growth:

- **Budget Development & Financial Planning**
 - **FEMA Emergency Management & Disaster Cost Recovery**
 - **Financial Communication & Stakeholder Engagement**
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Sample Learning Resources

We work with each client to recommend resources tailored to their goals. For this individual, we suggested:

Budgeting and Financial Planning

- [GFOA Budgeting Courses](#)
- [New York GFOA – Government Finance Institute](#)
- Customized training and mentoring through Financial & Leadership Consultants

Financial Management for Emergency Events & Disaster Recovery

- [GFOA: Disaster Recovery Cost Documentation](#)
- [ICMA: Disaster Recovery Essentials](#)

Ready to Learn More?

This sample FSA report reflects just one way we support financial professionals in identifying and achieving their leadership goals. If you or your team are looking to grow in capability, confidence, and impact, we'd love to help.

[Schedule a consultation](#) to explore how our assessments and coaching services can support your development journey.

<https://finleadership.com/contact-us>

Prefer email? Reach out to me directly at susan.goodison@finleadership.com.

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