

## The Agile Finance Manifesto

### Context:

The intention of this manifesto is to align values and principles and the development of a common language to bring the Agile and Finance mindsets closer together.

### Values:

Collaborating with stakeholders, business teams and customers  
*over isolated financial decision-making*

Responding to change and opportunities  
*over following static financial plans*

Delivering actionable insights and transparent information  
*over comprehensive financial reports*

Continuous improvement through dynamic resource allocation and relative goals  
*over rigid processes and controls*

### Accepted Assumptions:

We understand that Governance, Controls and Risk Management  
are built into Agile ways of working.

We recognise that, while the value statements on *the right* yield short term results,  
we value the statements **on the left** more,  
as they provide greater, better and more long-lasting results.

### Principles:

1. Our highest priority is to **satisfy stakeholders**, business teams and customers through timely and valuable financial insights.

2. Welcome **changing requirements**, even late in the process, when they make commercial sense. Agile finance harnesses change and external benchmarks for competitive advantage.

3. Deliver financial insights **frequently and transparently**, from real-time dashboards to rolling forecasts, with a preference for shorter timescales, a reduced volume of relevant reporting, and dynamic adjustments based on real-world performance and capacity.

4. Finance professionals and business teams collaborate frequently (even daily) throughout the organization, with a preference for finance professionals being closely involved with business teams to support the **alignment of decisions** with customer needs and organisational goals.

5. Build finance teams with **motivated individuals**. Provide them with the environment, tools, and trust they need to get the job done while allowing them to make decisions within clear boundaries.

6. The most efficient and effective way to communicate financial information is physical or virtual **face-to-face conversations**.

7. Working and effective **financial solutions and systems** are critical for freeing up capacity to allow finance teams to better support the wider organisation as they explore opportunities (e.g. through streamlined reporting, faster closing processes, and value driven budgeting).

8. Agile finance promotes **sustainable growth**. Finance teams, business teams and stakeholders should be able to maintain a constant pace indefinitely.
9. Continuous attention to **financial excellence** and technological advancement enhances agility.
10. **Simplicity**—the art of maximizing the amount of work not done—is essential.
11. The best financial insights and innovations emerge from **self-organizing teams** that understand both finance and business needs.
12. At regular intervals, finance teams reflect on how to become more effective and **adjust their behaviour** accordingly. From time to time, they do this by engaging with their stakeholders and business teams.