

ALL THE HARD QUESTIONS



Overcoming every barrier that a CEO has before letting their team spend time **In The Vault!**

Barriers

I've been a CEO and a CFO in my career. Here are the hard questions and concerns I would have about **In The Vault** (and have had from the peer groups I've been a part of) and then my notes on how I've overcome them. In my experience, these barriers are worth acknowledging and then overcoming for the greater good of your business and your people. I list them here with my insights like this:

Everett's notes: In The Vault exists solely to help achieve maximum health and value for F&A Teams. We do that by coaching already good finance and accounting teams to plan and implement specific resources while balancing risk and profitability, and thereby becoming championship teams.

I MIGHT LOSE CONTROL

Allowing Everett to influence my finance team feels like **handing over control** on internal development, the way we've always done it and decision-making processes.

Everett's notes: I'm challenging you to think about it differently. Rather than losing control, you **gain strategic leverage**. If you're honest about it, you know that is what the business needs to grow healthy, but I've been there in the CEO seat and I remember the struggle with letting go of the vine. Mentorship and trying new ways are what empowers your finance team to make smarter decisions independently gradually over time, freeing up leadership to focus on growth and innovation. That's how we all cut our teeth and we're better for it.

I'M SKEPTICAL ABOUT THE GROUP SETTING

I'm skeptical of the **"one-size-fits-all" group mentorship model**. My team doesn't like group projects and I'd rather it was tailored specifically for our business.

Everett's notes: This isn't a group project, it's a **modern, highly interactive and personalized**, business group, often blending peer learning with expert guidance. In finance and accounting, some things just naturally "fits-all" so we build on those and your team tailors the results specifically to your business—it's a curated experience that adapts to your team's needs and goals.

HESITANT ABOUT CONFIDENTIALITY AND TRUST

In a group setting, I'm concerned about **sharing sensitive financial strategies or challenges** with outsiders, even in a mentorship context.

Everett's notes: This is a world-class program that enforces **strict confidentiality and non-disclosure agreements** and creates safe, non-competitive environments. That's the reason I called it **"In The Vault"**. Participants share frameworks and experiences, project and driver results, performance on key metrics, but not proprietary data that would handicap you—so your company's sensitive information remains protected.

I'M WORRIED ABOUT COST

Even though the results are valuable, I worry about both the **direct (actual cash) and indirect (extra time for the team) financial cost** and whether it fits within my budget.

Everett's notes: I've built this mentorship as a **low-risk, high-return investment**. Compared to hiring consultants or fractional CFOs who come and go, or fixing costly financial missteps, group mentorship is a cost-effective way to upskill the team, create traction and accountability quickly and improve decision-making. There are no hidden fees and I guarantee the results.

IS THERE A POSITIVE ROI

Can you **quantify the benefits** of mentorship? I hesitate to clearly see how it will improve performance or profitability.

Everett's notes: We have **key performance indicators** built right into the model, like improved forecasting accuracy, faster month-end close, and better cross-functional collaboration. Above that though, the key components are built on adding value to admin, balancing the treasury, profiting from data, optimizing resources and developing the organization. Mentorship like this also boosts retention and engagement from your team. I've made the case that improving financial health and efficiency has a significant ROI that shouldn't be ignored.

TIME COMMITMENT TOO HIGH

Looks like In The Vault requires lots of participation. I fear that time spent in the program will **distract from day-to-day responsibilities** or critical deadlines and my team is already pretty busy.

Everett's notes: I designed In The Vault to **enhance productivity**, not hinder it. Sessions are very focused, laid out in advance, and scheduled routinely throughout the year. The time invested during the week, which averages 10% (one morning a week) leads to better prioritization, faster reporting, and fewer errors—saving time in the long run.

MY TEAM MIGHT FAIL

I question whether my finance team is **mature or skilled enough** to benefit from In The Vault mentorship, or if they need more foundational training first.

Everett's notes: I designed In The Vault to meet teams **where they are** most of the time. There are some projects they'll work on that are very difficult, some that they've already done, some that just need refinement. Whether your finance team is junior or seasoned, In The Vault captures the common shortcomings in a finance team and is structured to provide value at every level—building confidence, competence, and leadership capacity. I do this by focusing on accountability, learning, sharing and planning together, so the mature can build up the immature, and the unskilled can learn from the skilled.

WE'VE MADE SOME MISTAKES IN THE PAST

Admittedly, we've done some things in the past I'm not proud of, so I think In The Vault could **reveal weaknesses** in the team's capabilities or systems, or even my decision making that I don't want questioned or exposed.

Everett's notes: In The Vault is about **growth, not judgment**. It's a supportive space where teams learn from others' challenges and successes. Yes you've made mistakes, I've made mistakes. This vulnerability actually builds resilience and trust within your team. As the CEO you should be accustomed to being questioned! Everyone is watching you to see what you'll do.

WILL MY CULTURE CHANGE IN A BAD WAY

I worry that In The Vault and Everett's values or approach **don't align with the company's culture** or leadership style.

Everett's notes: My values aren't customizable or industry-specific, so if yours are too different you shouldn't read further. They are 1. Adapt to Win, 2. Point toward potential, 3. Help people find joy, and 4. Seek Impact. These have been my values for decades and they won't change.

My approach, however, has changed as I gained expertise and critical insights into finance and accounting. My leadership style is to push for excellence, seek clarity tenaciously, find joy in others succeeding, and create ways to understand and aim for potential. The 3 key parts of how I deliver In The Vault are “alignment, coaching and support”.

I'M TOO BUSY CEO-ING TO HELP WITH THIS

We have limited time and money, I have to prioritize other initiatives like sales, product development and operations over professional development for the finance team.

Everett's notes: Finance is the **backbone of strategic execution**. Investing in its development supports every other department not just right now, but forever (in my opinion). A stronger finance team means better resource allocation, risk management, and long-term planning. I'll be the expert at creating a healthy growing F&A team so that you can be the expert leader, integrator, visionary or wherever you add the most value to the business.