



# Welcome to The Xledger Podcast

Scoping and Implementing a Finance System  
Part 2



# Contents

- Slide 3: The panel
- Slide 4: Learning objectives
- Slide 5: Podcast agenda
- Slide 6: Reflection
- Slide 7: Further reading
- Slide 8: Further engagement

# The panel

This episode is hosted by Sian Hewitt, Content Manager at Xledger UK.

The panel includes:

- Ana Rodrigues, Project Manager at Xledger UK
- Tim Wright, Operations Director at Xledger UK
- Zheng Zeng, Consulting and Support Manager at Xledger UK

# Learning objectives

In part two of this two-part podcast, you will learn:

- Best practices for facilitating a smooth finance software transition
- The key challenges organisations face during implementation
- How to prepare for a finance software integration project
- Why strong leadership is crucial to a successful project delivery

# Podcast agenda

- 00:00:01 – 00:08:25 = Introduction
- 00:08:26 – 00:15:38 = Understanding the need for integration
- 00:15:39 – 00:19:06 = Practical tips for aligning new finance software with existing business platforms
- 00:19:07 – 00:23:21 = How to manage the fear of losing historical data
- 00:23:22 – 00:28:06 = What is the role of leadership during a finance implementation project
- 00:28:07 – 00:32:12 = Key advice for future-proofing your business systems
- 00:32:13 – 00:32:34 = Conclusion

# Reflection

Now you've completed part two of this two-part podcast, take time to reflect on your learning by answering the following questions:

- What are the key preparatory steps to building a successful integration project?
- What are the cons of migrating seven years' worth of historical data from one system to another?
- How can finance leaders guide the strategic direction of an implementation project?

# Further reading

- [Building a World-Class Digital Finance Function](#) – McKinsey & Company
- [What Finance can Expect with Integration CPM and Reporting Technologies](#) – EY

# Further engagement

Thank you for listening to the Xledger podcast.

If you would like to engage further with this content, please follow this link and send us your discussion points: <https://xledger.com/uk/cpd-feedback-form/>

