



Finance Function Transformation

Lessons Learned: What Works vs What Doesn't Work



John Swanick

Senior Director, Insurance Practice, Centri Consulting



Jurgen Schwabe

CFO, Global Finance Operations, Aspen Insurance



Martin Ferrer, CPA

Partner, Insurance Advisory Services, Grant Thornton



Garrett Buckless, CPA

Managing Director, Accounting Transformation, Centri Consulting



Francisco Romero, PMP

Senior Manager, Finance Transformation, Grant Thornton

How are finance operating models evolving and what have you seen in your many transformation roles?

- centralized vs. decentralized, shared services, or CoEs?
- How do you see the role of the CFO evolving in the next 5–10 years within the insurance sector?

How do you ensure that the team is on your side to make the transformation a success?

What are the pitfalls of claiming victory on a transformation journey too early?

What are the key drivers of finance transformation in the insurance industry today?

What are the biggest challenges in implementing automation in financial reporting processes?

How are technologies like AI, RPA, and BI reshaping finance operations in insurance?

What role does finance play in enabling broader enterprise transformation within insurance companies?

How are insurers balancing regulatory compliance with the push for digital innovation in finance?

What are best practices for change management and upskilling during a finance transformation journey?

What innovations are you seeing in financial close and reporting processes within insurance firms?

What does the “finance function of the future” look like for insurance companies?

What lessons can other industries learn from how insurers are approaching finance transformation?

John Swanick

jswanick@centricconsulting.com

Jurgen Schwabe

jurgen.schwabe@aspen.co

Martin Ferrer

martin.ferrer@us.gt.com

Garrett Buckless

gbuckless@centricconsulting.com

Francisco Romero

francisco.romero@us.gt.com

SIFM Society
of Insurance
Financial
Management

sifm.org

