

# Women in Finance - Leading Teams Through Change



# Women in Finance – Leading teams through change

*Few things are more important during a change event than communication from leaders who can paint a clear and confidence-inspiring vision of the future”. – [Sarah Clayton](#)*

1. Culture as a catalyst for change
2. Shaping a future-ready finance team
3. Managing change resistance



# Webinar Learning Objectives

**After attending this session, attendees will be able to**

- ❖ Explore the link between team performance and agility/ adaptability
- ❖ Learn leadership strategies to build high performing teams for change readiness
- ❖ Understand other techniques for leaders to embed adaptability as a team norm
- ❖ Explore the strategic role of automation in finance (how automation is reshaping finance)
- ❖ Discover strategies & benefits of driving a culture of automation-driven change
- ❖ Understand ways in which leaders can foster innovative mindsets in their teams
- ❖ Understand how leaders can recognize change resistance early
- ❖ Learn practical approaches to proactively address change resistance with teams and stakeholders

## Poll Question 1 : Culture as a catalyst for change

High-performing teams are strongly linked to better change adaptability and agility?

Yes/No



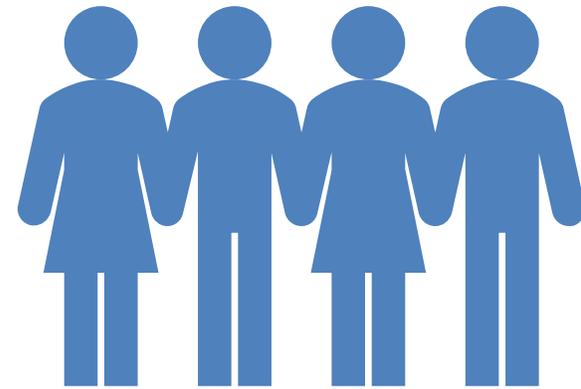
**Linda Nel**  
CA (SA), CPA

**Linda Nel** is a globally experienced real estate executive with over 22 years of success in capital markets, investment management, and platform transformation. She has deployed over €1.3B in private debt across the UK and Ireland, led major recapitalizations and M&A transactions, and raised capital from top-tier institutional investors. Known for her ability to drive growth, operational leadership in directing cross functional teams, operational efficiency, and institutional-grade performance, Linda has held senior leadership roles at Reliant Real Estate, KPMG, and Quadrant Real Estate Advisors. Linda is a CPA and CA(SA), combining technical expertise with strategic vision to deliver results in complex, high-value environments. Linda is based in Atlanta Georgia and is also a member of the CAW Network USA executive team focusing on Member Engagement.

Building High-Performing and Agile  
Teams During Change

Presented by:

# Culture as a Catalyst for Change



# Introduction: Being a Catalyst for Change

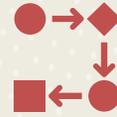
Focused on three key questions:

Where are we now?

Where do we want to go?

How do we get there?

# The Situation: Constant Change in Investment Management



**Change is constant,  
not occasional**



**Regulatory  
frameworks evolve**



**Investor  
expectations shift**



**Market dynamics  
transform**



**Competitive pressures demand  
continuous adaptation**

# The Complication: When High Performance Doesn't Equal Adaptability

Success in one context  $\neq$  success in another

Core skills often need to be reapplied differently

At Company A: building European platform under new regulations

At Company B: technically strong teams lacking commercial agility



Common  
Challenges  
During  
Transformation

Risk aversion — teams rely on old methods



Slow decision-making — waiting for perfect info



Talent attrition — uncertainty and misalignment



High-performing teams can stall if not built for agility.

# The Challenge

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How do we build investment teams that maintain high performance while developing agility to navigate constant change?



How do we help talented people pivot and apply their existing skills in new contexts without losing discipline or investor confidence?

# Strategy 1: Build Structure That Enables Confidence



Provide clarity, not bureaucracy



Define decision rights and boundaries



Build frameworks that accelerate, not slow, execution



Example: Raised €1.6B across Europe by creating structured yet flexible fund frameworks

# Strategy 2: Help People Apply Strengths in New Contexts



Recognize transferable skills



Involve the team in problem-solving



Reframe setbacks as learning



Example: Repurposed underwriting and risk skills to raise capital and strengthen investor relationships

# Strategy 3: Align Everyone Around Investor Outcomes



Focus on investor needs, not internal processes



Understand mandates, constraints, and goals

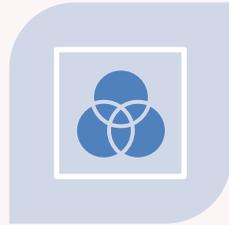


Deliver transparent communication and consistent performance



Example: Built €1.3B Irish and £300M UK portfolios through investor trust

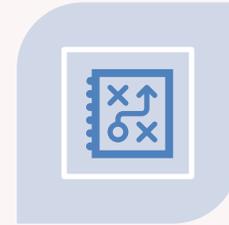
# The Performance–Agility Link



WHEN STRUCTURE ENABLES  
CONFIDENCE, STRENGTHS ARE  
REPURPOSED, AND TEAMS  
ALIGN AROUND OUTCOMES:



- TEAMS ANTICIPATE MARKET  
SHIFTS



- ADAPT STRATEGIES  
PROACTIVELY



- BUILD OWNERSHIP AND  
RESILIENCE

# Conclusion: Leading Through Change



We are all catalysts for change



Sustainable transformation  
builds cultures of adaptability



High performance and agility  
can—and must—reinforce each  
other



“Adaptability is the new  
competitive advantage.”

## Poll Question 2: Shaping a future ready finance team

Automation-driven transformation should be supplemented  
by upskilling your finance teams

Yes/No



Shingirai “Shingi” Gwindingwi, CPA and CA(SA), is an accomplished accounting professional with deep expertise in public, technical, and operational accounting. She spent nine years at BDO in the U.S. and South Africa, building a strong foundation in public accounting, and currently serves as an Experienced Managing Consultant at CrossCountry Consulting, where she advises on complex technical and operational accounting matters. In add Shingi is Treasurer and Board Member of Chartered Accountants Worldwide Network USA and is based out of New York.

**Shingi Gwindingwi**

CA (SA), CPA

# Shaping a Future-Ready Finance Team - *Driving Automation-Driven Change in Finance*

Presentation by Shingi – 10/30/2025

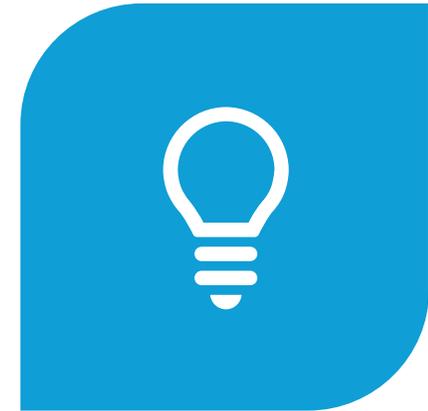
# The Changing Role of Finance



HISTORICALLY: TRANSACTIONAL  
AND COMPLIANCE-FOCUSED



NOW: STRATEGIC PARTNER IN  
BUSINESS DECISION-MAKING

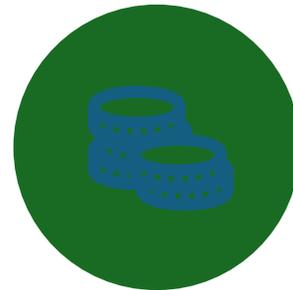


TOMORROW: DATA-DRIVEN,  
TECHNOLOGY-ENABLED,  
INSIGHTS-LED

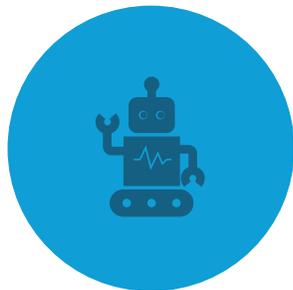
# What Does “Future-Ready” Mean?



Digitally skilled and agile



Focused on value creation, not transaction processing



Leveraging automation, analytics, and AI



Continuous learning and adaptation

# Automation in Finance Today

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## Examples of automation areas:

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Accounts payable/receivable

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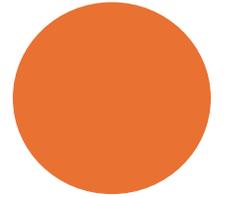
Reconciliations and reporting

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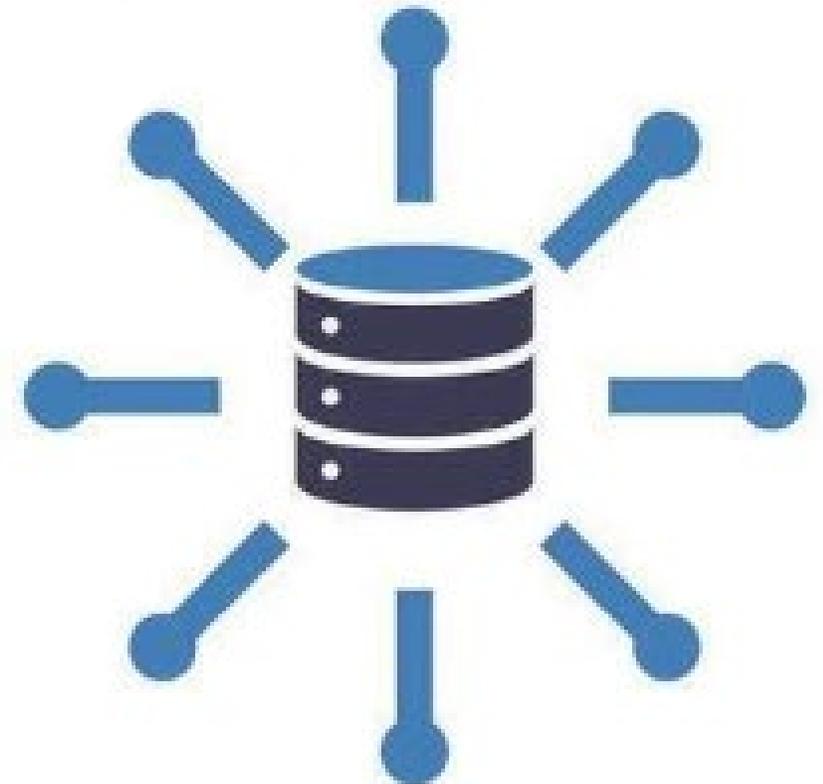
Forecasting and budgeting using predictive analytics

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Compliance monitoring



Data Analysis



# The Benefits of Automation- Driven Change

Efficiency and cost savings

Improved accuracy and compliance

Faster insights and decision  
support

Increased employee engagement  
through meaningful work

# The Human Element

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Upskilling and reskilling critical

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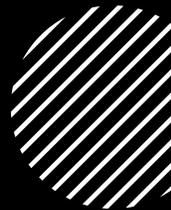
Encourage curiosity and digital literacy through experimentation

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Build cross-functional collaboration between finance, IT, and operations



# Roadmap to a Future- Ready Team



**Assess** current capabilities and automation potential



**Prioritize** high-impact automation areas



**Invest** in technology and data infrastructure



**Upskill** and empower teams



**Foster** a culture of innovation and continuous improvement



## Example: Automation in Action

- **Before:** Month-end close took 10 days
- **After:** Using workflow automation and AI → reduced to 5 days
- **Result:** 50% faster close, better insight turnaround, more time for analysis

# Challenges to Navigate

Change  
resistance and  
fear of job loss

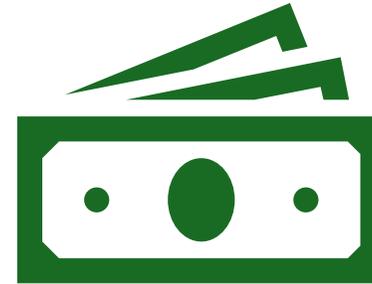
Data integrity and  
integration issues

Lack of clear  
ownership  
between finance  
and IT

# The Vision



“Empowered by technology, driven by insight.”



## **Key Takeaway:**

‘The finance team of the future doesn’t just report on the past – it shapes the future.’

## Poll Question 3: Managing change resistance

Resistance to change is always a negative outcome for leadership

Yes/No

Nancy is a transformational leader, who is passionate about influencing positive organizational change, coaching and people development. She has a demonstrated background in building highly functional and culturally diverse global teams. Nancy works as a Senior Director of Accounting for a Fortune 200, American multinational company based in Indianapolis. Nancy is an alumni SAICA Top 35 under 35 finalist, where she also won the Lead Award. She is a Chartered Accountant (South Africa) and a member of CPA Canada. Nancy is driven by continuous learning, uplifting others. She is an experienced Board Member of non-profit organizations. Nancy is the Vice President of Chartered Accountants Network Worldwide, USA.



**Nancy Chakabuda**

CA (SA), CFE, CPA, MBA



# **Managing Resistance to Change**

Nancy Chakabuda CA (SA),  
CPA, MBA

“...change management  
requires strong emotional  
and social intelligence. It is  
a part of *inside-out*  
leadership”

- Amit Ray



# The leadership dilemma

*Managing change – “Inside-out leadership”*

## Multi-impact change

### Impact on direct teams

*(e.g. work methods, org. structure)*

### Impact on indirect teams

*(e.g. cross-functional teams)*

### Impact on stakeholders

*(e.g. internal & external stakeholders)*



*Navigating change response, while directing impactful change towards your vision*

## Multi-layered response

**Passive change resistance**

**Active change resistance**

**Constructive change resistance**

***Barriers vs resistance?***

# Change resistance

*Why people resist change?*

## Individual Level factors

- **Human nature** - fear of the unknown
- **Threat** to individual power e.g. skills, position, control
- **Prior experiences** with change not positive
- **Readiness** – feeling of not being equipped to handle the change

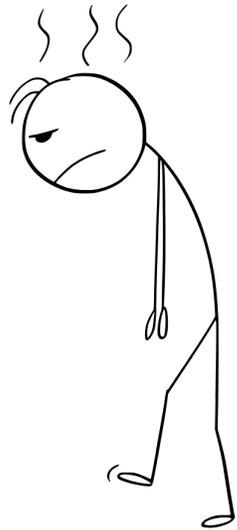
## Organization Level factors – 3 C's

- **Communication** - lack of, inconsistent or limited communication
- **Clarity** - translation of how change applies to those impacted
- **Culture** - prior experiences with leadership in times of change (influences trust level in leaders & credibility)



# Key watch-out for leaders

*‘Change burnout’ as an influence of resistance*



**Yes, change is inevitable but can change be too much?**

- **Change fatigue / change burnout** *“frustration, apathy, & resistance that can arise among employees subjected to frequent, ongoing changes in organizational structures and processes” (NeuroLeadership Institute, 2023).*

# Change resistance

## *Identifying change response as leaders*

### Passive resistance

- Silent & disengaged from the change.
- Employees reluctant to feedback on the change.
- Low energy for the change but little impact on progress.



### Constructive resistance

- Engaged & enthusiastic about the change.
- Provides valuable feedback & ideas.
- Could have high impact on progress of change.



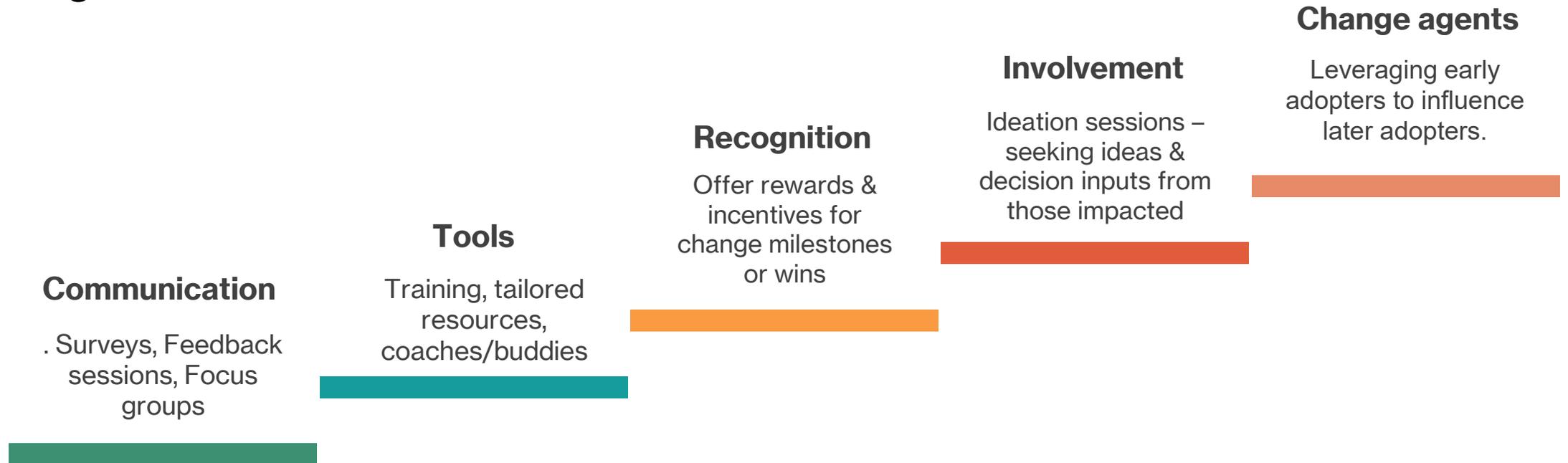
### Active resistance

- Incites conflict during change.
- High energy but non-constructive intent.
- Negativity slows down progress of change.



# Managing resistance

What standard change management practices can help leaders navigate change resistance?



**Note:** In general, there are prescriptive change management models leaders can apply, depending on type of change, that are not explored in this session.

# Managing resistance

## *Shifting resistance to adaptability*

Some examples - when & how can I as a leader apply the practices?

**Case 1** – Stakeholders have been consistently providing negative feedback about how an upcoming **organization structure change** in your team, will impact efficiency of a shared process.

**Communication** – key milestones, open dialogue for concerns to clarify misunderstandings.

**Involvement** - consult for input at key decision points impacting shared process for buy-in & to build joint ownership for successful change.

**Case 2** – Your direct report appears distant and non-receptive to an **automation change** in your department & seems hesitant to speak up or provide feedback.

**Involvement** - include team in ideation stage to build comfort & ownership for change.

**Communication** - deploy multiple feedback collection channels on change experience.

**Recognition** – incentivize involvement in change process (celebrate wins).

**Case 3** – Your manager is excited for **new work** your team is taking on but has provided valid input on ensuring team readiness for the change (skills & capacity).

**Tools** - provide structured training & simple guidance documents to build competence for change.

**Change agent** – leverage mgr's support to mobilize excitement & convey importance of readiness – demonstrates support for the change.

# Your role as a leader

Be visible & accessible  
during times of change

**Over** communicate rather  
than **under** communicate.  
Be *transparent*.

**Lead by example** - be  
transparent, ask for feedback  
- build trust.

**“Change resistance is not a barrier, it’s a signal”**  
- *Steven Pressfield*



## Poll Question 4

Change and Transformation are the same concepts

Yes/No

# Panel discussion



**Moderator:**  
**Nicolette Tavares**  
CA(SA), CPA



**Linda Nel**  
CA (SA), CPA

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[Linda.Nel@cawnetwosa.com](mailto:Linda.Nel@cawnetwosa.com)

LinkedIn – Linda Nel



**Shingi Gwindingwi**  
CA(SA), CPA

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[sgwindingwi@gmail.com](mailto:sgwindingwi@gmail.com)

LinkedIn – Shingirai Gwindingwi



**Nancy Chakabuda**  
CA (SA), CPA, MBA

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[nanvim@gmail.com](mailto:nanvim@gmail.com)

LinkedIn – Nancy Chakabuda

# End of Webinar Survey



Thank You