



The Financial Risk & Opportunity Lens

Seeing where risk hides — and opportunity is missed

A short exercise to clarify how well your financials support confident decisions.

How to use this Lens: Answer each question honestly based on how decisions are made today—as *they actually happen*, not as you wish they were made.

Lens 1: Visibility (Where Risk Hides)

Statement:

1. We have timely financial information when decisions need to be made—not weeks later. ☐
2. Cash flow projections reflect reality, not just best-case assumptions. ☐
3. We can explain recent financial changes without needing follow-up analysis. ☐

Lens 2: Interpretation (Where Opportunity Is Missed)

Statement:

4. Leadership discussions focus on implications, not just results. ☐
5. We understand why numbers change, not just that they changed. ☐
6. Financial data helps us evaluate tradeoffs before committing resources. ☐

Lens 3: Action Readiness (Where Decisions Slow Down)

Statement:

7. Financial insights lead to timely action, not extended debate. ☐
8. Ownership for financial decisions is clear. ☐
9. We feel confident moving forward without needing “one more report” or follow-up analysis. ☐

How to interpret your responses

Look for patterns across your “Yes,” “Sometimes,” and “No” responses.

- If you selected “**Sometimes**” or “**No**” in any one Lens, that area **may be creating hidden risk or decision friction**.
- If you selected “**Sometimes**” or “**No**” across multiple Lenses, your financials **may be limiting confidence and slowing decisions**.
- If most responses are “**Yes**,” your financials **are likely supporting timely, confident decision-making**—and positioned for deeper strategic use.

How to focus your attention

If most “Sometimes” or “No” responses were in **Visibility**

Your financials may be creating hidden risk.

➡ **Focus on improving timing, consistency, and cash clarity before optimization.**

If most were in **Interpretation**

Your financials may be masking missed opportunity.

➡ **Focus on translating numbers into implications and using scenario planning to evaluate tradeoffs.**

If most were in **Action Readiness**

Your financials may be creating decision friction.

➡ **Focus on clarifying decision ownership and context—adding more data won’t reduce hesitation.**

If this diagnostic surfaced questions or gaps, Strategic Finance can help you interpret what matters most and determine next steps—without jumping to solutions too quickly.

Learn more at bridgesourceaccounting.com/strategic-finance