



## PROJECT CASE STUDY

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# EMPOWERING FINANCE LEADERS

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## HOW AMNA ZAIDI BUILT TRUST AND INSPIRED CHANGE AT PLEO'S "BEYOND" EVENT

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**To schedule your event**

## ABOUT PLEO'S EVENT

Pleo, a leading expense management software company, hosted Beyond to address the challenges faced by finance leaders in today's dynamic environment.

With the theme "Striking the Balance Between Trust and Control," the event explored how modern financial systems can foster accountability while empowering teams with trust-based frameworks.

## INTRODUCTION DELIVERING TRUSTED EXPERTISE

In October 2024, finance professionals from across the UK gathered at Pleo's Beyond event to explore cutting-edge strategies for modernising financial control.

To ensure the event delivered impartial, actionable insights, Pleo turned to Amna Zaidi, FCA, CMgr, MCMI—a finance transformation expert with over 20 years of experience.

Amna's ability to distil complex challenges into clear, tangible strategies helped attendees embrace transformative change with clarity and confidence.

This case study showcases her contributions and the lasting impact of her involvement.

## THE CHALLENGE: ELEVATING FINANCIAL CONTROL

Pleo set out to deliver a high-impact event that resonated deeply with finance leaders navigating the complexities of modern financial control. Key challenges included:



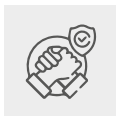
### Aligning Financial Systems

Ensuring systems evolve alongside dynamic business strategies.



### Data-Driven Decisions

Leveraging analytics to manage risks and identify growth opportunities.



### Balancing Trust and Accountability

Fostering a culture of trust while maintaining transparency and control.

To address these challenges effectively, Pleo needed a speaker who could offer actionable strategies, provide real-world leadership insights, and engage the audience with credibility and relatability.

## WHY AMNA ZAIDI WAS THE PERFECT FIT

Amna Zaidi's extensive experience in finance transformation at leading organisations, including NatWest/RBS, Deloitte, and Lloyds, positioned her as the ideal choice for the event.

- **Proven Expertise:** With over two decades of delivering impactful change, Amna is recognised as a trusted authority in finance transformation.
- **Actionable Insights:** Known for her ability to simplify complex challenges, Amna provided clear strategies attendees could immediately apply.
- **Credibility and Relatability:** As a seasoned speaker, Amna's thought leadership added immense value, inspiring confidence and trust among attendees.

Her participation brought a unique perspective to the event, bridging innovative ideas with practical application.

## KEY CONTRIBUTIONS DURING THE EVENT

Amna played a pivotal role in the session "Striking the Balance Between Trust and Control," sparking dynamic conversations and providing actionable insights into modernising financial systems. She addressed:

- **Strategic Alignment:** How financial control systems can drive transformation and support strategic objectives.
- **Simplifying Financial Control:** The importance of user-friendly, scalable solutions that ensure efficiency and adoption.
- **Adaptability in Real-Time:** Leveraging adaptable systems to navigate compliance and market changes effectively.

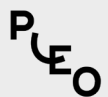
Her insights into data analytics, risk management, and decision-making shaped the discussions and empowered attendees with practical frameworks for financial transformation.

## THE RESULTS: DRIVING ENGAGEMENT AND TRUST

Amna's participation received enthusiastic feedback from attendees and event organisers alike:

"Amna brought her deep industry expertise and a unique perspective to the panel discussion, sparking dynamic conversations among the attendees. She engaged the audience, making the session come to life and resulting in strong feedback."

– Thorbjørn Fink, COO, Pleo



## Key Outcomes

- Delivered a framework for finance leaders to make informed decisions about financial software solutions.
- Empowered attendees to adopt trust-based frameworks while maintaining accountability.
- Positioned Pleo as a thought leader in addressing the evolving challenges of modern financial control.

## What the Audience Gained

Amna provided attendees with a clear roadmap for modernising financial systems and aligning them with organisational priorities. Key takeaways included:

- **Harnessing Data Analytics:** Forecasting financial risks and identifying growth opportunities.
- **Choosing Scalable Solutions:** Evaluating and selecting user-friendly systems that align with strategic goals.
- **Building Trust-Based Frameworks:** Empowering teams while ensuring transparency and accountability.

## WHY AMNA ZAIDI

20+ years of experience at key organisations



Deloitte.



serco



## CONCLUSION: INSPIRING CONFIDENCE AND CHANGE

Amna Zaidi's participation at Pleo's Beyond event demonstrated her ability to equip finance leaders with actionable strategies for navigating transformation. Her expertise in modern financial control empowered attendees with practical frameworks to optimise operations, manage risks, and drive sustainable growth.

## YOUR NEXT STEP: ELEVATE YOUR EVENTS WITH INDEPENDENT EXPERTISE

For software companies marketing to finance teams, partnering with an independent expert like Amna Zaidi can significantly enhance your event's credibility and provide your audience with tools to make confident decisions.

**Don't wait—contact us today** to discover how Amna's expertise can elevate your next event and provide your audience with actionable insights that deliver lasting results.



Take the First Step



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Book a complimentary consultation now to discuss your event needs