

This framework adapts Michael Gerber's classic book "E-Myth Revisited" to the finance leadership journey. It maps the transition from technical expertise to strategic leadership, with practical tips at each stage.

Stage 1: THE TECHNICIAN

Identity: Analyst, Associate, Trader, Deal-Maker, or Product Specialist

Focus: Technical excellence, precision in execution, mastery of models, or compliance details

Strengths: Accuracy, speed, independence, intellectual depth

Risk/Trap: Over-identification with being the smartest in the room; inability to let go of the details

Tips to Transition to Manager:

- Keep a "delegation log": track tasks you could teach someone else, even if you could do them faster yourself. See the document "5 Tools for Better Delegation"
- Shift language from "I built this model" to "My team delivers insights."
- Practice mentoring: review someone else's work not for correctness, but for how they think

Stage 2: THE MANAGER

Identity: VP, Controller, Risk Manager, Client Coverage Lead.

Focus: Processes, repeatability, accountability. You translate complexity into systems that allow others to deliver consistent results.

Strengths: Operational efficiency, quality control, risk mitigation

Risk/Trap: Becoming a bottleneck or micromanager; measuring success only by short-term compliance rather than long-term development

Tips to Transition to Strategic Leader:

- Replace "fixing errors" with "designing systems that prevent errors"
- Learn to "manage up": bring insights to senior leadership rather than just reporting
- Expand your network beyond immediate team to build cross-functional allies

Stage 3: STRATEGIC LEADER

Identity: CFO, Managing Partner, Managing Director, Head of Product/Markets

Focus: Vision, influence, capital allocation, creating culture. You shape the business model and open doors for others.

Strengths: Strategic foresight, storytelling, external credibility

Risk/Trap: Losing touch with ground reality; neglecting the mentorship pipeline

Tips to Strengthen as a Strategic Leader:

- Translate finance insights into enterprise-wide narratives: not just "our margin dropped 3%" but "our margin drop tells us where to invest for resilience."
- Stay close to external signals (regulation, technology, market shifts) and connect them to firm vision.