



CPE SESSION

Beyond the Numbers

Turning Analysis into Action



Paige Cocke

Founder, Leadership Without Lipstick™ | Realize Success LLC

WELCOME

You already know how to get to a technically correct answer.

- This session isn't about the numbers. It's about what you do with them — and how you actually decide.
- Whether you're a senior accountant sharpening your instincts, or a CFO who trusts them every day — this is the same skill.
- If you're in the room virtually, you're fully part of this — use the chat, and our moderator will bring your voice in.

Where we're headed

01

Know Your Filter

Mental models, and why awareness comes before speed

02

Beyond the Numbers

Framing the problem, setting your criteria, and finding the drivers that matter

03

Widen the Lens

Other perspectives and the implications you'd otherwise miss

04

From Analysis to Action

What actually stops leaders from deciding — and how to move anyway



"Should we go with the analytic plan, the gut instinct plan, or the coin flip plan?"



Having analysed the data we're pretty sure there will be a result, we just don't know what it might be.



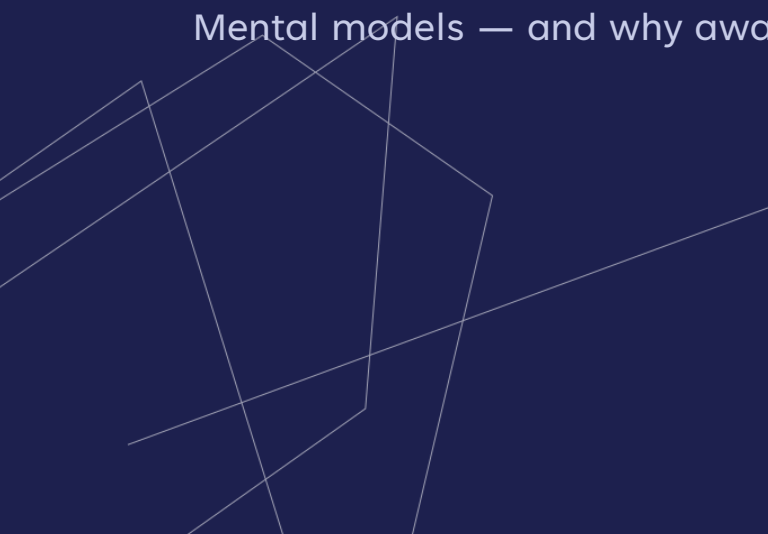
**"Personal request here. Do not begin your forecast
with the words 'I'm just guessing, but ...'"**



PART ONE

Know Your Filter

Mental models — and why awareness comes before speed





TURNOVER
DECISION NEEDED
FORECAST

ATTRITION

PIPELINE
\$400K
URGENT

RISK

HEADCOUNT
KPI

12%
18%

ROI

OVERHEAD
EBITDA

VENDOR

MORALE

CONTRACT

Q3

COMPLIANCE
AUDIT

MARGIN

PLEASE ADVISE

ASAP
RUNWAY

RECONCILIATION

FY26

90 DAYS

BUDGET

DEADLINE

COVENANT
CASH FLOW
ESCALATION

ACCRUAL

THRESHOLD

VARIANCE
\$2.1M
\$86K

BACKLOG

47%

3.2x

22%

Every day, you make decisions that matter.

- They affect you, your team, your organization — and sometimes the wider community.
- Some are easy calls. Many aren't.
- Large amounts of information, unclear issues, and usually not much time to sort it out.

Analytical skill isn't a nice-to-have for a leader. It's baseline infrastructure.

So how do you decide what matters?

You filter. Everyone does — whether they realize it or not.



A mental model is the filter every human uses — built from your knowledge, experience, wisdom, and beliefs — to make sense of everything you take in.

Your mental model decides —



What you see

and, just as powerfully, what you don't



What you pay attention to

out of everything competing for it



What options you even generate

before you ever get to “choosing”

Here's the catch.

Because everyone already has a value and belief system in place, every mental model is — by definition — limiting.

Awareness of your own filter is the first move a leader makes — before speed, before confidence, before the “right” answer.

TAKE 30 SECONDS

Just think — you don't need to share.

- *When was the last time you were sure you were right — and weren't?*
- *What's a decision you made fast that you'd make differently today?*
- *Whose perspective do you instinctively discount?*

Facilitator note: ask these aloud, then hold the silence for a full 30 seconds — in person and on the call.

How you define the problem changes everything.

It governs what information you gather, how you evaluate it, and who you even involve. Get the frame wrong, and the best analysis in the world points you the wrong way.

IF YOU DEFINE IT AS...

- **“We don’t understand the issue.”**
- → You invest in better communication and shared understanding.

IF YOU DEFINE IT AS...

- **“We don’t agree on what the issue even is.”**
- → You invest in gaining agreement on the actual issue — first.



PART TWO

Beyond the Numbers

Framing, criteria, and the drivers that actually matter





Set your goal and your criteria — first.

- Establish a clear goal for the decision — what does "solved" actually look like?
- Determine your criteria before you have an answer: cost, speed, risk, reversibility — decide what matters before you're tempted to reverse-engineer it from the data.
- Skip this step, and you'll gather information for a decision you never actually defined.

You don't need all the information.
**You need to understand the business
drivers.**

That's the whole game in this section.



Break it into manageable parts

- A complex issue feels unsolvable as one big blob — so start by separating it.
- What's known from what's unknown
- The root issue from its symptoms
- The decision in front of you from the next one down the road



Focus on what's critical

Not everything handed to you is signal. Some of it is noise — feelings, personalities, politics dressed up as data.

- Ask: does this actually change the decision?
- If not, it's not critical right now — set it aside, don't chase it
- What's left are your business drivers: the few variables that actually move the outcome

Let's make it concrete

A department head walks in wanting an extra \$400,000 in budget. The room fills with opinions — team morale, a competitor's hiring spree, a rough quarter last year. All real. None of it moves the number.

NOISE

- Team morale is low
- A competitor is hiring aggressively
- Last year was a rough quarter

BUSINESS DRIVERS

- **Material cost per unit is up 18%**
- **Order volume is up 30% against a plan built before either of those things happened**



Look past assumptions — and test them

- Under pressure, people jump to a decision without checking what they assumed. The obvious cause is often just the visible symptom.
- Ask: “What would have to be true for this to actually be the cause?”
- Write down what you’re assuming to be true — out loud, if you can.
- Then ask: what’s the cheapest, fastest way to test it before you bet the decision on it?

Back to the budget request

The easy assumption: “Material costs went up because of the market.” Accept it, approve the \$400K, move on.

The underlying cause worth testing: did we lose our volume discount? Did a supplier contract auto-renew at a worse rate?

One phone call to the supplier answers it — and might turn a \$400K ask into a negotiation instead.

Finding your drivers isn't the finish line.

You've broken the problem down, filtered the noise, and found the real drivers. That's the analysis. It's not the decision.

A driver only earns its keep when it changes what you do next. Here's how to actually get from “these are the drivers” to “here's the decision.”

Turn drivers into a decision

1

Quantify the driver

Put a real number on what each driver actually moves — not the noise, the driver.

2

Weigh it against your threshold

What can the business actually absorb? Compare the driver's size to that line, not to your gut.

3

Decide the number

Not yes/no — the actual figure, scope, or date. A direction isn't a decision.

4

State driver + decision together

“Because X, we're doing Y.”
One sentence, said out loud, in the room.

The actual decision

Driver 1 — material cost: up 18%, real and unavoidable. On this department's spend base, that's roughly \$150K — the business has to absorb it somewhere.

Driver 2 — volume: up 30%, but tied directly to revenue growth already in this quarter's forecast — it should mostly fund itself.

The decision: approve \$150K now for the cost driver. Hold the remaining \$250K pending Q3 actuals on the volume-funded revenue. Same \$400K ask — a completely different, defensible decision.

Abstract geometric lines in the top right corner of the slide, consisting of several thin, white, overlapping lines that form a complex, star-like pattern.

Drivers alone are just trivia.

The muscle is doing both — every time.

That's Beyond the Numbers. Now let's widen the lens.



PART THREE

Widen the Lens

Other perspectives — and the implications you'd otherwise miss





Widen who's in the room

Your filter got you this far. It also has blind spots — and before you finalize a call, pull in the people and viewpoints who'd see it differently.

- The newest person on the team, or the function that isn't yours — ops, sales, HR
- The person who disagreed with you last time
- How would Sales, Operations, or an auditor argue this differently? Give each 60 seconds — even alone.

Quickly recognize the broader implications

Every decision moves more than the number in front of you.

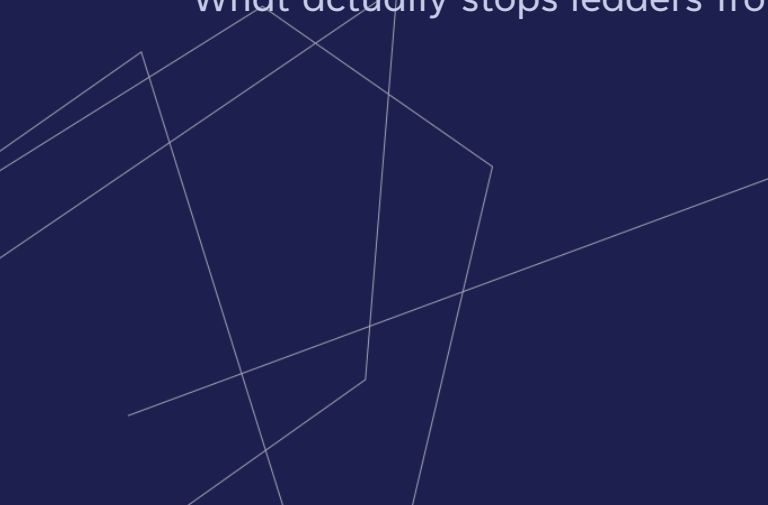
- Who else does this touch, downstream?
- What does this decision signal — even if you don't mean it to?
- What's the second-order effect, two quarters out?



PART FOUR

From Analysis to Action

What actually stops leaders from deciding — and how to move anyway



What actually gets in the way

It's rarely the data. More often, it's this:

- Procrastination — waiting for one more data point that won't actually change the call
- Indecision, or fear of pushback — staying quiet so no one can blame you for being wrong
- Nobody's sure who's even supposed to decide
- And underneath all of it: the real risk that the decision turns out impractical, wrong, or even harmful



Move — even without certainty

Waiting for 100% certainty isn't caution. It's procrastination wearing a suit.

- Advance the problem toward resolution despite ambiguity and uncertainty — you'll rarely get full clarity, and that's not a reason to stall.
- Curb impulsiveness — decisive isn't the same as fast. It means moving deliberately once you have enough.
- Act decisively once you've cleared that bar — a half-decision is often worse than either choice made clearly.



Own it, and own the clock

- Take responsibility for your decisions — including the ones that don't work out. That's what makes people trust your next one.
- Make timely decisions — a good call made late is often worse than a good call made on time.
- “I'll think about it” is sometimes true. It's also sometimes just fear of pushback wearing a calendar invite.



Decide who decides

A surprising number of stalled decisions aren't stuck on the answer — they're stuck on who's actually supposed to give it.

- Clarify decision-making responsibilities and methods before you start, not after someone's upset.
- Are you deciding alone? Consulting, then deciding? Building consensus? Say which — out loud.
- Collaborate with the right people, but don't let "collaborative" quietly become "nobody's accountable."



Define — and choose — the best alternative

- Analysis isn't finished until you can name more than one real path forward.
- Not: "should we do the thing?" Instead: "here are 2–3 real options, with trade-offs."
- Then choose. A set of options you never pick from isn't a decision either.
- A single option isn't a recommendation — it's an ultimatum.

How sound decisions get made

1

Frame it, know your filter

Define the problem, name your mental model, set your goal and criteria.

2

Find the drivers

Break it down.
Filter the noise.
Question your assumptions.

3

Widen the lens

Pull in other viewpoints. Trace the broader implications.

4

Decide

Choose, own it, act on time — then test it.



THE TAKEAWAY

You don't need all the information.

You need to understand what's driving it — and the will to decide.

That's the shift from analysis to action. Start it Monday morning.



Thank you

Paige Cocke — Realize Success LLC

