



How to build a KYC and a KYR

A plain-language guide for candidates, employers and recruiters

Part A: KYR from a job description

Part B: KYC from a CV

Part C: the fit

A KYR describes a role and a KYC describes a candidate, in the same classical SWOT grid, so the two can be laid side by side. Anyone can build both in about an hour from two documents they already have: a job description and a CV.

S · Strengths

KYR: what the company brings

KYC: what I bring, with proof

W · Weaknesses

KYR: the gap the hire must fill

KYC: where I am still growing

O · Opportunities

KYR: what the role offers

KYC: where I create most value

T · Threats

KYR: what makes it hard

KYC: what would make a role fail

PART A · FROM A JOB DESCRIPTION

Build the KYR

- 1 Find the reason.** Ask why this role exists now: a deadline, a failed project, growth. Write it as one sentence. That is the *Why now* band.
- 2 Read for problems, not tasks.** Behind every task line sits a problem. "Harmonise 14 company codes" means the processes differ today. Problems go to W.
- 3 Sort every line into a box.** Sponsor, budget, team, assets go to S. Scope, reporting line, pay and growth go to O. Deadlines, travel and dependencies go to T.
- 4 Keep four per box, ranked.** Merge duplicates. Drop boilerplate such as "dynamic team" and long module lists.
- 5 Test the must-haves.** Keep only what you would reject a strong candidate for. Everything else is an advantage.
- 6 Note the silences.** What the JD does not say (pay, decision rights, real travel) becomes a question for the first call.

PART B · FROM A CV

Build the KYC

- 1 Pull out decision stories.** Three to seven moments where you decided something and it changed a result. Each needs a number.
- 2 Strengths:** what you know, what you can do (as verbs) and whom you serve best. Each point carries its proof.
- 3 Weaknesses:** the honest gaps your next role should close. Write them as growth steps, not apologies.
- 4 Opportunities:** where market demand meets your strengths, plus the level, pay and place you want.
- 5 Threats:** what would make a role fail for you, and what you need instead. These are your deal-breakers.
- 6 Purpose:** one sentence on what you want your work to change. Sign it off yourself.

Four per box

Ranked, most important first. The ranking is what makes two grids comparable.

Proof for every point

A project, a number or a named result. No proof, no point.

Same words on both sides

Write the KYC in the role's language, not in module codes.



THE TALENT BRIEF · HOW-TO

Part C: reading the fit

Lay the two grids side by side and ask four questions

Match

Partial

To clarify

The fit is read in four crossings. Each crossing asks one question, and each line gets one of three marks: Match, Partial or To clarify.

CROSSING 1**Role W × candidate S**

Can the candidate fill the gap the role exists for? Put each of the role's four problems next to the candidate's strongest proof. This crossing decides whether a conversation is worth having.

CROSSING 2**Must-haves × evidence**

Does every must-have have a proof in the KYC? A must-have without proof is To clarify, not a rejection: CVs often leave the best evidence out.

CROSSING 3**Role O × candidate W and O**

Does the offer grow the candidate? A role that closes a candidate's gap keeps them longer than one they have already done twice.

CROSSING 4**Role T × candidate T**

Do the role's hard parts hit a deal-breaker? Travel, pace, decision rights and team setup belong here. One confirmed deal-breaker ends the match.

THE VERDICT**Count, then name the question**

- 1 Count the marks.** Many Matches in crossings 1 and 2 means the candidate can do the job.
- 2 Read the Partials.** Partials in crossing 3 are good news: they show where the candidate will grow.
- 3 Turn every To clarify into a question** for the first call, in the order that could end the match.

HOW TO USE IT**Candidate, employer, recruiter**

- 1 Candidates:** build the KYR from the job ad before you apply, then send your KYC and the fit instead of a cover letter.
- 2 Employers:** write the KYR before the job ad. If W is hard to fill in, the role is not clear yet.
- 3 Recruiters:** present candidates as KYC plus fit, so the hiring manager sees proof, not adjectives.

THE EXAMPLE

The next pages walk through one invented case: a job description, a CV, and the KYR, KYC and fit built from them.

Credits: the grid is a classical SWOT; its questions draw on the Flower exercise by Richard N. Bolles in *What Color Is Your Parachute?*



WORKED EXAMPLE · STEP 1 · THE INPUT FOR THE KYR

The job description

As it would appear on a job board

Fictional

Typical format: tasks, profile, offer

A typical job description: a list of tasks, a list of requirements and a vague offer. The KYR on page 5 turns it into problems, proof and questions.

SAP S/4HANA Finance Transformation Lead (m/f/d)

FICTIONAL EXAMPLE

European industrial manufacturer · 4,000 employees in 12 countries · Stuttgart, hybrid · travel about 20% · reports to the CFO, dotted line to the CIO

ABOUT THE ROLE

We are moving from SAP ECC 6.0 to SAP S/4HANA Cloud, Private Edition (RISE with SAP) before ECC mainstream maintenance ends in 2027. Finance goes first. The contract is signed and our implementation partner is selected.

YOUR RESPONSIBILITIES

- Lead the finance workstream of the S/4HANA programme end to end
- Design one global finance template (FI, CO, AA, Treasury) and harmonise 14 company codes
- Shorten the month-end close from 8 to 4 working days
- Introduce SAP Group Reporting and evaluate SAP Business AI for close and accounts payable
- Lead 8 part-time key users and steer the implementation partner
- Own finance data quality and migration

YOUR PROFILE

- 10+ years of SAP FI/CO experience
- At least two full-cycle S/4HANA implementations
- Experience leading mixed teams of business and IT
- Fluent German and English; SAP certification an advantage
- Dynamic, hands-on team player with strong communication skills

WHAT WE OFFER

- A flagship programme with CFO sponsorship and budget approved
- Development into Head of Finance Processes after go-live
- Competitive package, company car, 30 days of holiday



The CV

As a candidate would send it

Fictional

Typical format: roles, projects, skills

A typical CV: roles in reverse order, projects and certifications. The KYC on page 6 turns it into ranked strengths with proof, honest gaps and deal-breakers.

Candidate B · SAP Finance Solution Architect

FICTIONAL EXAMPLE

Baden-Württemberg · German (native), English (fluent), French (basic) · SAP Certified Application Associate, S/4HANA Finance

PROFILE

Fifteen years in finance and SAP: four as a controller and SAP key user, eleven as a consultant and architect. Two full-cycle S/4HANA finance programmes. Looking to move to the client side and own the result after go-live.

EXPERIENCE

2021 – today · Senior Manager, SAP Finance, global system integrator

- Lead finance architect, S/4HANA greenfield for a chemicals group in 9 countries: one global template, close cut from 7 to 4 days
- Finance lead, S/4HANA for a retailer in 5 countries; introduced SAP Group Reporting
- Led up to 12 consultants across two countries

2015 – 2021 · SAP FI/CO Consultant, later Team Lead, mid-size SAP partner

- Six ECC rollouts in FI, CO and asset accounting; data migration lead on four of them
- Treasury: cash management basics

2011 – 2015 · Financial Controller, automotive supplier

- SAP CO key user; owned the monthly close for two plants

EDUCATION AND MORE

- MSc Finance · Speaker at a DSAG finance working group
- Prefers Baden-Württemberg; travel up to 30%



KNOW YOUR ROLE · BUILT FROM THE JOB DESCRIPTION ON PAGE 3

S/4HANA Finance Transformation Lead

European industrial manufacturer · reports to the CFO

Stuttgart, hybrid

Travel about 20%

Team of 8 key users + partner

RISE, Private Edition

Leads the finance workstream of an ECC to S/4HANA move, with one global template, a faster close and clean data, before ECC maintenance ends.

HELPFUL

S

Strengths

What the company brings

- CFO sponsorship**
Flagship programme with budget approved.
- Decisions already made**
RISE contract signed; implementation partner selected.
- International scope**
4,000 employees, 12 countries, 14 company codes.
- A path after go-live**
Development into Head of Finance Processes.

HARMFUL

W

Weaknesses

The gap the hire must fill

- Fourteen ways of working**
Company codes run on different processes.
- A slow close**
Month-end takes 8 working days; target is 4.
- No S/4 finance know-how in-house**
Nobody has run a full S/4HANA finance cycle.
- Data quality**
Finance master data must be cleaned before migration.

O

Opportunities

What the role offers

- End-to-end ownership**
The whole finance workstream, not one module.
- CFO reporting line**
Direct access to the sponsor.
- A modern stack**
Group Reporting and SAP Business AI for close and AP.
- Leadership**
8 key users plus the partner's finance team.

T

Threats

What makes it hard

- A fixed deadline**
ECC maintenance ends in 2027.
- Part-time key users**
The team has day jobs.
- Partner dependence**
Delivery capacity sits with the integrator.
- Unstated pay**
"Competitive package" gives no band.

WHY NOW

ECC maintenance ends in 2027, and finance must close faster on one template before the rest of the business moves.

Must-haves: 10+ years of SAP FI/CO; two full-cycle S/4HANA implementations; leading mixed business and IT teams; German and English.
Advantage: SAP certification.



KNOW YOUR CANDIDATE · BUILT FROM THE CV ON PAGE 4

Candidate B

SAP Finance Solution Architect: designs finance templates that close faster, and wants to own them after go-live

Baden-Württemberg

German · English · French

Travel up to 30%

Fifteen years in finance and SAP: four as a controller and key user, eleven as a consultant and architect, including two full-cycle S/4HANA finance programmes.

HELPFUL

S

Strengths

What I bring: proven, documented

- 1 Global finance templates**
One template across 9 countries for a chemicals group.
- 2 A faster close**
Close cut from 7 to 4 days.
- 3 Business and IT in one person**
Former controller and SAP key user; speaks both languages.
- 4 Data migration**
Migration lead on four ECC rollouts.

HARMFUL

W

Weaknesses

Where I am still growing

- 1 Line management**
Has led project teams of up to 12, never a line team.
- 2 RISE experience**
Both S/4HANA projects were greenfield, not RISE Private Edition.
- 3 Treasury depth**
Cash management basics only.
- 4 AI in finance**
No live Business AI use case yet.

O

Opportunities

Where I create most value

- 1 Companies leaving ECC by 2027**
Finance-first moves need exactly this profile.
- 2 The client side**
Owning the result after go-live, not handing it over.
- 3 A process-owner path**
From programme lead to head of finance processes.
- 4 Close to home**
Baden-Württemberg, hybrid.

T

Threats

What would make a role fail, and what I need instead

- 1 Key users without time**
Needs committed business capacity.
- 2 Steering without design authority**
Needs the final say on the finance template.
- 3 Heavy travel**
Needs travel at or below 30%.
- 4 Relocation**
Needs to stay in the region.

PURPOSE Build finance processes that close faster and stay clean after go-live, and stay to run them.

Roles considered: Finance transformation lead, head of finance processes or finance systems, on the client side in DACH.



KYC × KYR · HOW CANDIDATE B FITS THE JOB DESCRIPTION

Candidate B × Finance Transformation Lead

Each need from the KYR on page 5, answered with proof from the KYC on page 6

KYR: S/4HANA Finance Transformation Lead

KYC: Candidate B

Read before the first call

Verdict

Strong fit, three points to clarify**7**

Match

3

Partial

3

To clarify

ROLE W (THE GAP) × CANDIDATE S (STRENGTHS)

WHAT THE ROLE NEEDS (KYR)	WHAT THE CANDIDATE PROVES (KYC)	FIT
Harmonise 14 company codes	One global template across 9 countries	MATCH
Close from 8 to 4 days	Close cut from 7 to 4 days at a chemicals group	MATCH
No S/4 finance know-how in-house	Two full-cycle S/4HANA finance programmes	MATCH
Finance data quality	Migration lead on four ECC rollouts	MATCH

MUST-HAVES × CANDIDATE EVIDENCE

WHAT THE ROLE NEEDS (KYR)	WHAT THE CANDIDATE PROVES (KYC)	FIT
10+ years of SAP FI/CO	Eleven years as consultant and architect, four as key user	MATCH
Two full-cycle S/4HANA implementations	Chemicals (9 countries) and retail (5 countries)	MATCH
Leading mixed business and IT teams	Led up to 12 consultants; business teams not named	PARTIAL

ROLE O (THE OFFER) × CANDIDATE W AND O

WHAT THE ROLE NEEDS (KYR)	WHAT THE CANDIDATE PROVES (KYC)	FIT
RISE, Private Edition	Greenfield only so far: the role closes this gap	PARTIAL
Lead 8 key users; path to Head of Finance Processes	No line team yet; wants the process-owner path	PARTIAL

ROLE T (WHAT MAKES IT HARD) × CANDIDATE T (CONDITIONS)

WHAT THE ROLE NEEDS (KYR)	WHAT THE CANDIDATE PROVES (KYC)	FIT
Travel about 20%	Up to 30% is fine	MATCH
Part-time key users	Deal-breaker if they have no committed time	TO CLARIFY
Steering the partner	Needs final say on the finance template	TO CLARIFY
"Competitive package"	Salary expectation not stated either	TO CLARIFY

WHY NOW × PURPOSE

The company must close faster on one template before 2027; the candidate wants to build exactly that and stay to run it.