

February 7 - 8, 2012
San Francisco, CA

Business Analytics Week

FP&A 2012



Budgeting & Forecasting
Financial Modeling & Planning
FP&A to Drive Business Growth
Communication & Integration
Continuous Improvement
Financial Performance Analysis
FP&A Innovation



Earn up to 20 CPE Credits



Summit Presenters



Parisa Naserlavi, Director of Finance Decision Architecture
at **Cisco Systems**

Frank Merchiers, Vice President, Global Business Intelligence & Financial
Information Delivery at **InterContinental Hotels Group**



Amanda Hashfield, Sr. Controller at **Intel Corporation**
Mary Loomas, Sr. Controller at **Intel Corporation**

Ricardo Dalmas, Sr. Director, Strategy at **Pepsi Beverages Company**



David Elrod, Finance Director at **Microsoft**

Carla Zorn, Director, Finance Transformation at **Intuit**



Curtis Neumann, Associate Director, Corporate FP&A at **AT&T**

Marco Morescalchi, Sr. Manager, Performance Management & Strategic
Planning at **Nike, Inc.**



Rob Kugel, Senior VP - Research Director at **Ventana Research**

And Many More.....



510-984-3620 ♦ www.gmi-solutions.com
Contact Alex Smith for detailed speaker information:
asmith@gmi-solutions.com

Agenda



February 6, 2012

2:00 – 5:00 pm Pre-Event Workshops

5:00 pm Networking Reception

February 7, 2012

8:30 am **Keynote: Competitive Advantage through FP&A**
A roadmap for FP&A to improve business analysis, drive better decision making and enhance strategic alignment

9:45 am **Keynote: Financial Modeling and Planning**
Creating a data foundation for financial modeling

11:00 am **Strategic Financial Planning**
Link financial planning to strategic planning to optimize resource allocation

12:00 pm Lunch and Networking Break

1:00 pm **Financial Planning & Analysis to Drive Business Growth**
A snapshot of FP&A driving better decision making, reducing costs and optimizing profitability

1:45 pm **High Performance Driver Based Modeling**
Realize the value of streamlining and automating financial planning processes

2:30 pm **Finance Business Partnering**
Providing business partnership and influence to maximize profitability

3:15 pm **Balanced Scorecard for FP&A**
A methodological approach to financial measures, metrics and analytics

4:00 pm **Foundations for Rolling Forecasts**
Maximize continuous “driver-based” planning to keep your forecasts current and accurate

4:30 pm Networking Reception

February 8, 2012

8:30 am **Keynote: Financial Performance Analysis**
Utilize KPIs and performance drivers to impact financial and operational results

9:45 am **Keynote: FP&A Process Excellence**
Microsoft moving beyond process standardization

11:00 am **Advanced Financial Analytics**
Financial decision making based on facts, data and analytical insight

12:00 pm Lunch and Networking Break

1:00 pm **Change Management for FP&A**
“Making Change Stick” to drive performance and accountability

2:15 pm **FP&A Innovations**
Maximize tools and resources available to run and optimize a financial planning program

3:30 pm Adjourn

In today's marketplace, good analytics are the key differentiator for smarter decision making and gaining competitive advantage. An organization's ability to harness and leverage the wealth of available financial data is a key factor in effective, strategic, financial planning, budgeting and forecasting. **FP&A 2012** is a comprehensive learning and networking opportunity analyzing the most pressing concerns of financial planning through the use of analytical insight.

FP&A 2012 is a unique opportunity for those looking to expand their knowledge of financial planning, budgeting and forecasting through the effective use of analytical insight.

Attendees will instantly realize the difference between this forum and other conferences. Learning sessions are vendor agnostic and there are **NO sales pitches**. Presentations will be conducted by the most talented corporate experts and thought leaders, both regionally and nationally. For those who are interested in learning more about available tools, a select few vendors will be invited to provide demos and information by request.

FP&A 2012 is part of **Business Analytics Week 2012**. This comprehensive event brings together analytics users from across functions and industries into one integrated, week-long event.

Business Analytics Week 2012 is the most comprehensive business analytics event on the market today.

- *A unique experience designed specifically for the FP&A role*
- *Expert practitioners and methodologists across industry sectors*
- *Networking opportunity to meet with colleagues and industry experts*

Bring Your Team
3 Attendee Group Rate

\$ 3,995

FP&A 2012

Recent Presenters Include:



 Gateway Management, Inc.

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8:30 am

Keynote:

Competitive Advantage through FP&A

A roadmap for FP&A to improve business analysis, drive better decisions and enhance strategic alignment

- Develop an FP&A competitive advantage roadmap
- Create management intelligence to better understand the business
- Transformational analysis with cross functional collaboration and advanced business intelligence
- Focus on activities such as business analysis, external analysis and strategic alignment
- Operationalize processes and procedures for to drive better decision making

9:45 am

Keynote:

Financial Modeling and Planning

Creating the data foundation for financial modeling

- Data driven decision making to improve financial modeling and planning
- Create cause-and-effect relationships linking business drivers to financial and operational outcomes
- Apply a methodological approach to testing assumptions and scenario analysis
- Leverage financial intelligence to better predict financial outcomes

11:00 am

Strategic Financial Planning

Creating the data foundation for financial modeling

- Link corporate strategic planning to financial strategic plans and to the annual budget
- Utilize key drivers to establish realistic plan targets for budget owners
- Manage adjustments, coordinate plans and execute more efficiently
- Balance tops-down and bottoms-up planning to ensure the process adds value for all participants
- Capitalize on analytics to improve forecasting and planning



1:00 pm

Financial Planning & Analysis to Drive Business Growth

A snapshot of FP&A driving better decision making, reducing costs and optimizing profitability

- Link financial management to key business drivers
- Optimize the quantity and quality of useful information
- Effective analysis that allows senior management to make more informed decisions
- Decision support aligned to business needs and objectives
- Leverage technology for improved accuracy, deeper business knowledge and real time decision making

1:45 pm

High Performance Driver Based Modeling

Realize the value of streamlining and automating financial planning processes

- Implement the “power of one process” as a financial best practice
- Develop consistent financial and operation data definitions
- Leverage finance and technology knowledge to provide key insights
- Maximize processes for to allow analysts to perform insight analysis

2:30 pm

Finance Business Partner

Providing business partnership and influence to maximize profitability

- Getting a seat at the table – adding value to your business partner
- How to use internal and external acumen to influence your business partner
- Balancing breadth of knowledge with depth of knowledge
- Finance rotation programs to provide perspective and growth

3:15 pm

Balanced Scorecard for FP&A

A methodological approach to financial measures, metrics and analytics

- Assess the input and performance metrics utilized in the forecasting process
- Determine what KPIs are essential to meet strategic objectives
- Implement a methodological approach managing financial performance
- Utilize scorecards and dashboard to monitor strategic execution
- Develop timely, engaging reports with thorough analysis of results

4:00 pm

Foundations for Rolling Forecasts

Maximize continuous “driver based” planning to keep your forecasts current and accurate

- Utilize the advantages of re-forecasting and rolling forecasts
- Maximize a continuous planning process driven by changing events and constant updates
- Analyze, interpret and integrate rolling forecast processes across the organization
- Capitalize on predictive analytics to improve forecasting and planning



8:30 am

Keynote:

Financial Performance Analysis

Utilize KPIs and performance drivers to impact financial and operational results

- Utilize measures that drive accountability and performance
- Determine what KPIs are essential to meet strategic objectives
- Assess the input and performance metrics utilized in the forecasting process
- Utilize a manage system to monitor and drive performance
- Develop timely, engaging reports with thorough analysis of results

9:45 am

Keynote:

FP&A Process Excellence

Microsoft moving beyond process standardization

- Framework for incorporating one version of the truth for finance
- Ensure accurate information, reliable analysis and consistent reporting
- Develop methodological approaches to manage and scale FP&A activities
- Emphasize repeatable processes for forecasting, budgeting and reporting
- Shift focus of finance staff to strategic advisors and business partners

11:00 am

Advanced Financial Analytics

Financial decision making based on facts, data and analytical insight

- Use advanced statistical and econometric methodologies to make better predictions
- Total cost minimization and net revenue maximization methodologies
- Develop models for better scenario planning for predictive sales and risk management
- Multivariate testing and advanced regression modeling
- Synthesize integrated analytical insights into tactical planning

1:00 pm

Change Management for FP&A

"Making Change Stick" to drive performance and accountability

- Maximize the liaison role between finance and executive decision makers
- Incorporate financial planning and analysis throughout the organization
- Translate financial data to engage employees and attain improved buy-in
- Provide access to information to promote accountability and transparency

2:30 pm

FP&A Innovations

Maximize tools and resources available to run and optimize a financial planning program

- Uncover best practices in FP&A from leading organizations
- Analyze tools and best practices for running an optimal FP&A department
- Challenge current concepts and strategies through interactive dialogue with contemporaries
- Share stories from the field, scenarios and outcomes for future planning
- Discuss the future of FP&A and the "fast track" to success

Monday, February 6th, 2:00 pm – 5:00pm

3 CPE Credits

Rolling Forecasts Workshop: *An operational guide to implementing and utilizing continuous planning and rolling forecasts*

This comprehensive three hour workshop will provide a framework to integrate continuous planning and rolling forecast processes at your organization. With a focus on people, process and technology, this hands-on workshop will help you:

- Incorporate continuous planning to keep your forecasts current and accurate
- Utilize operational drivers to better predict financial forecasts
- Utilize the advantages of re-forecasting and rolling forecasts
- Maximize a continuous planning process driven by changing events and constant updates
- Analyze, interpret and integrate rolling forecast processes across the organization
- Implement advanced scenario planning and analysis to better predict future outcomes

Workshops

Data Quality Management Workshop

Half-day workshop 12:30 – 3:30pm

Optional alternative to afternoon sessions

“Decisions are only as good as the information on which they are based.” Analytics users struggle with data quality as a primary issue when trying to make evidence-based and data-driven decisions. Knowing that organizational data is in a constant state of flux, it is important for organizations to create an established data quality and governance framework. This workshop simplifies data quality management through an easy to use, 7 step governance framework. This framework has been implemented in some of the nation’s largest and most complex, data-using organizations and has proven scalability.

Course Learning Objectives:

- Seven-step data quality management framework
- Fundamentals of data consolidation and aggregation
- Explaining the data quality challenge
- Data-quality lifecycle models and criteria-driven, proactive/reactive processes
- Data validation methodologies

Business Analytics Workshop

Half-day workshop 4:00 – 7:00pm

Analytics are a fundamental tool to address business challenges and reveal business insights. Though business analytics offer a wealth of opportunity and competitive advantage, there are also risks associated with not performing analytics processes efficiently and accurately. Both business users and data and analytics managers must speak the same language and understand the business concerns being addressed. This workshop introduces a framework for effectively using analytics to address a breadth of organizational issues, across functional disciplines.

Course Learning Objectives:

- Understand the link between business analytics and business success
- Understand the analytics value-chain for optimized usage
- Data management, translation and interpretation
- Align business analytics with business objectives
- Create a unified framework for data and analytics usage throughout the organization



Business Analytics Week 2012

Unique Learning Opportunities

Business Analytics Week 2012 is the premier thought leadership and networking summit on the market. With more than ten distinct tracks and workshops, delegates are given a unique opportunity to learn from dozens of top practitioners from the nation's leading organizations. The curriculum is designed specifically to address both functional analytics and business strategy to create an integrated, cross-functional perspective.

Premier Networking Event

We recognize the importance of networking before, during and after the event. Hundreds of analytics professionals will be in attendance at **Business Analytics Week 2012**, fostering a tremendous opportunity to network with business people from a breadth of industry and functional backgrounds. Several networking receptions and breaks are scheduled throughout the course of the week. Additionally, all attendees are given membership into the Gateway Analytics Network to facilitate pre and post event learning and networking.

Vendor-Neutrality

Gateway Management takes pride in the vendor-neutrality at **Business Analytics Week 2012**. We take strong steps to ensure that both plenary and breakout sessions are void of software or solution pitches.

Tuesday February 7, 2012	FP&A 2012	
	HR Planning & Analysis 2012	Talent Management Planning & Analysis
		Workforce Planning & Analysis
Wednesday February 8, 2012	FP&A 2012	
	HR Planning & Analysis 2012	Talent Management Planning & Analysis
		Workforce Planning & Analysis
Thursday February 9, 2012	Predictive Analytics & Business Insights	
	Marketing Planning & Analysis 2012	B2B Marketing Planning & Analysis 2012
		Consumer Marketing Planning & Analysis 2012
		Digital Analytics 2012
Friday February 10, 2012	Predictive Analytics & Business Insights	
	Marketing Planning & Analysis 2012	B2B Marketing Planning & Analysis 2012
		Consumer Marketing Planning & Analysis 2012
		Digital Analytics 2012

A unique Networking Opportunity

Not only do attendees come to learn innovative skills and best practices in business planning and analytics, they also come to meet with peers from different industries across and functional backgrounds. Keeping this in mind, attendees are given a chance to network with colleagues from across analytical functions.

*Network with colleagues and
industry experts from different
analytical functions*

An entire week of cross-functional analytics will cover topics related to FP&A, workforce analytics, both online and offline marketing, predictive and business insights. Several networking receptions will be taking place throughout the week, providing a great opportunity to meet and learn from hundreds of attendees from these distinct areas of focus. Additionally, an online community will provide a continuous forum for continued engagement among attendees and presenters before and after the event.



Recent Attendee Organizations Include

Accuray
Actelion Pharmaceuticals
Adobe Systems
Affymetrix
AGCO
Alere
Allstate
American Superconductor
Amway
AMICA MUTUAL INSURANCE
AppliedMicro Circuits
Appro
Array BioPharma
Audi
Atmel
Bank of the West
BASF
Beekley
Blessing Health
Briggs International
Cadence
Cedar Sinai
Celanese Corporation
Centura Health
Cepheid
Charles Schwab
Chik-Fil-A
Chipotle
Chiquita
Cisco
Citrix
CNN
Comcast
ConAgra
Copa Airlines
Cox
Dean Foods
Diebold
Dolby
Dominoes
EA
eBay
EJ Gallo
Emerson
Eon US
ESPN
Exelon Corporation
Expedia
F5
Facebook
FedEx
Ferring Pharma
Fifth Third Bank
FL Smidth
Flour
Foot Locker
FW Murphy
Gap Inc.
Genentech
Gilead
Grant Thornton LLP
Hamilton Beach Brands, Inc.
IHG
Infinity Pharmaceuticals
Intuit
JCI
JDS Uniphase
JP Morgan
Juniper
Gap Inc.
Genworth
Hardies
Harvard Clinical Research Institute
JDS Uniphase
Johnson Matthey
JP Morgan
Juniper
Keurig
Kaiser Permanente
KLA-Tencore
Lam Research
Lancer Corp
Land O' Lakes
Levi's
Lexis Nexis
Liberty Mutual Group
Life Technologies
Lincoln Industries
McDean
Maxwell Technologies
Maxygen, Inc.
Macys.com
Lonza
Mercedes-Benz USA
MGM Resorts
Micron Technology
Microsoft Corporation
Morrison & Foerster LLP
Mutual of Omaha
Nestle
NetApp
Nike
Nissan
Omnicell, Inc.
Papa Murphy's Intl.
PayPal
Popeyes@ Louisiana Kitchen
Procter & Gamble Company
RCI
Rent-A-Center
Research In Motion
Roche
SanDisk
Sara Lee
Scotttrade
Sephora
Stryker
Symantec
Tibco
Timberland
Tempur Pedic
Trident Micro
URS
USAA
Visa Inc
Vonage
WellPoint, Inc.
Wells Fargo
Turner Sports
And many more...

San Francisco

Area, Venue & Travel Information



Room Rate

\$ 149.⁰⁰ / night

Reservations: 1-888-627-8404

Mention the **Gateway Management Room Block** to the customer service agent to receive this exclusive reduced rate.

Online Reservations:

<https://www.starwoodmeeting.com/StarGroupsWeb/booking/reservation?id=1110311089&key=D4CF7>

Area – San Francisco International Airport

Located near San Francisco International Airport, our venue provides excellent access to Bay Area transportation as well as all the city has to offer. Gateway Management has on-the-ground knowledge of the area's best restaurants, hotels and shows to maximize your experience outside the Summit.

Hotel and Accommodation Facilities

Our venue's excellent location offers easy access to the entire San Francisco Bay Area. We have scouted locations throughout the region and find that the Westin San Francisco Airport offers excellent accommodations, a unrivaled meeting environment and tremendous value.

Travel

This event is best accessed by-way-of San Francisco International Airport. A hotel shuttle leaves every 20 minutes from SFO, directly to the event location. Oakland International Airport offers another convenient traveling option for our non-local guests and can be accessed by BART trains or taxi cabs.

Venue – Westin San Francisco International Airport

The Westin San Francisco Airport
1 Old Bayshore Highway
Millbrae, CA 94030



Earn CPEs

CPE Credits: Up to 20

Gateway Management is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Web site: www.nasba.org.

Program Level:	Basic
Delivery Method:	Group-Live
Prerequisites:	None
Advanced Preparation:	None



FP&A 2012, San Francisco

Registration & Contact Information

Registration Form

Name

Title Organization

Street Address

City/State/Zip

Telephone Fax

Email

Payment Information

Check/Purchase Order Credit Card

Name on Card

Card Number

Expiration Date CV2 (card verification number)

Billing Address

City/State/Zip

Cancellation/Rescheduling Policy

All cancellations that made four weeks or longer from the summit's start date will be provided a full refund or credit toward current or future Gateway Management programs. Any cancellations made within four weeks of the programs start date will be provided with credit toward current or future Gateway Management programs.

FP&A 2012 Fees

<input type="checkbox"/>	Early Registration <i>Tuesday & Wednesday Event</i>	\$ 1,599. ⁰⁰
<input type="checkbox"/>	Standard Registration <i>Tuesday & Wednesday Event</i>	\$ 1,799. ⁰⁰
<input type="checkbox"/>	Additional Attendee <i>Tuesday & Wednesday Event</i>	\$ 1,299. ⁰⁰
<input type="checkbox"/>	3 Attendee Rate <i>Tuesday & Wednesday Event</i>	\$ 3,999. ⁰⁰

Business Analytics Week Add-On Options

<input type="checkbox"/>	Day One of Predictive Analytics & Business Insights <i>Thursday, December 9th</i>	\$ 599. ⁰⁰
<input type="checkbox"/>	Business Analytics half-day Workshop	\$ 399. ⁰⁰
<input type="checkbox"/>	Rolling Forecasts half-day Workshop	\$ 399. ⁰⁰
<input type="checkbox"/>	Business Analytics Week <i>Five Day Event</i>	\$ 2,799. ⁰⁰

For "Early Registration", register by November 25, 2011

Call
510-984-3026

Fax
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Online
www.gmi-solutions.com

For group discounts, packages and local information please email Alex Smith:
asmith@gmi-solutions.com