

Financial Intelligence Forum

FP & A 2010



- Budgeting & Forecasting
- Continuous Scenario Planning
- Performance Analysis
- FP&A Communication & Integration
- Price & Margin Analysis
- Rolling Forecasting
- Developing a Centralized FP&A Unit



Earn 12 CPE Credits

Program Agenda

Monday, November 15th; Day Two

8:00 am Registration, orientation and continental breakfast

Keynotes

8:30 am **Integrated Business Planning**
Improve organizational performance with cross functional enterprise planning

9:30 am **Competitive Advantage Through Analytics**
Harness analytics to promote better strategic planning and drive execution

10:15 am Networking Break

10:45 am **Planning, Budgeting and Forecasting**
Implement innovative approaches to improve your budgeting and forecasting processes

Noon Lunch & Networking Break

1:00 pm **Financial Forecasting and Scenario Analysis**
Forecasting models, "what if" scenarios and predictive analysis for financial planning

2:15 pm **Data Consolidation, Translation and Interpretation**
Develop meaningful interpretations and recommendations to drive better business decisions

3:30 pm **Advanced Financial Analytics**
Drive optimal decision making through extensive qualitative and quantitative analysis

4:30 pm **Technology Brief**
An opportunity to view current solutions in the business intelligence and analytics marketplace

Tuesday, November 16th; Day Two

8:00 am Registration, orientation and continental breakfast

Keynotes

8:30 am **Drive Business Intelligence Through Collaboration**
An enterprise approach to business planning and analysis

9:30 am **Performance Analysis**
Utilize KPIs and performance drivers to impact financial and operational results

10:15 am Networking Break

10:45 am **Process Improvement for FP&A**
Develop consistent forecasting, budgeting, reporting and analysis

Noon Lunch & Networking Break

1:00 pm **Revenue Management & Price Optimization**
Enhance revenue recognition through the application of advanced financial intelligence

2:15 pm **Reporting Planning & Analysis**
Develop accurate and timely reports for improved decision making

3:30 pm **Financial Intelligence Panel: The Evolution of Financial Management**
Analytical insight and the growth of the FP&A function

4:30 pm **Adjourn**

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FP&A 2010

Financial Planning & Analysis 2010 is a comprehensive training opportunity that provides best practice case studies, applications sessions, trainer consultation, interactive panel dialogues and peer to peer networking. This format allows attendees to assess best practices from leading organizations, then learn to apply the challenging approaches through hands on learning and lastly, provide group trainer consultation to address specific needs.

FP&A Summit Snapshot

- 2 days of advanced Financial Planning & Analysis strategies
- 12 presentations on innovative topics
- Best practice case studies from industry leading practitioners and methodologists
- Take home presentations
- Networking reception at one of the nation's top art galleries
- Small group software demonstration opportunities

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 internal data is a key factor in effective strategic planning. **Business Planning & Analysis 2010** is a cross-functional learning and networking opportunity analyzing the most pressing concerns of corporate finance, workforce and marketing analytics.

This unique collaborative program provides attendees the opportunity to learn from industry-leading practitioners and methodologists. Each morning, attendees will gather for keynote presentations from strategic planners and business intelligence executives from top organizations. Following these keynote addresses, attendees will break out into separate areas to learn from experts discussing topics specific to their functional and organizational interests.

3 Attendee Group Rate

\$ 3,995.⁰⁰



Day One:

Keynote

Case Studies

& Best Practices



8:30 am

Keynote: Integrated Business Planning

Improve organizational performance with cross functional enterprise planning

- Use a functionally integrated approach for streamlined business planning
- Leverage technology and advanced processes for more accurate enterprise information
- Insure financial, marketing and workforce plans are linked to strategic plan
- Evaluate plans and activities based on the true economic impact of each consideration
- Extend visibility to identify impacts of specific market events well into the future

9:30 am

Keynote: Competitive Advantage Through Analytics

Harness analytics to promote better strategic planning and drive execution

- Optimize distinct business capabilities to gain competitive advantage
- Effective analysis that allows senior management to make more informed decisions
- Decision support aligned to business needs and objectives
- Utilize analytics to better determine ROI
- Establish predictive capabilities through analytics for better forecasting

10:45 am

Planning, Budgeting and Forecasting

Implement innovative approaches to improve your budgeting and forecasting processes

- 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

For detailed speaker information, please contact:

Josh Powell

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510-984-3620 ♦ www.gmi-solutions.com



Day One:

Best Practices & Strategy Sessions

1:00 pm

Financial Forecasting and Scenario Analysis

Forecasting models, "what if" scenarios and predictive analysis for financial planning

- Develop driver based models that incorporate key financial drivers
- Utilize "what if" scenarios for exploring alternative decisions or actions to predict possible outcomes
- Capitalize on analytics to improve financial forecasting and planning
- Take advantage of innovative tools for improved predictability
- Develop better line of site to business and talent needs

2:15 pm

Data Consolidation, Translation and Interpretation

Develop meaningful interpretations and recommendations to drive better business decisions

- 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

3:30 pm

Advanced Financial Analytics

Drive optimal decision making through extensive qualitative and quantitative analysis

- Use advanced statistical and econometric methodologies to make better predictions
- Developing analysis-based reporting platforms to support strategic and financial planning
- Learn how data anticipates financial forecasts, trends and risks
- Multivariate testing and advanced regression modeling
- Synthesize analytical insights into financial strategy and management

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Day Two:

Keynote Case Studies & Best Practices



8:30 am

Keynote: Drive Business Intelligence Through Collaboration

An enterprise approach to business planning and analysis

- Implement systems for accurate and timely data collection mechanisms
- Leverage people, processes, information and technology to optimize performance
- Maximize individual, departmental and functional expertise to drive results
- Achieve buy-in from stakeholders that influence strategic planning and organizational decision making
- Develop an effective system to share and communicate information

9:30 am

Keynote: Performance Analysis

Utilize KPIs and performance drivers to impact financial and operational results

- Incorporate the most effective marketing measures
- Determine what KPIs are essential to meet strategic objectives
- Assess the input and performance metrics used in the forecasting process
- Utilize a management system to monitor and drive performance
- Develop timely, engaging reports with thorough analysis of results

10:45 am

Process Improvement for FP&A

Develop consistent forecasting, budgeting, reporting and analysis

- Ensure accurate information and reliable analysis
- Develop methodological approaches to managing FP&A activities
- Emphasize repeatable processes for forecasting, budgeting and reporting
- Reduce waste, cut costs and eliminate opportunities for errors
- Implement lean six sigma principles for improved FP&A

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Day Two:

Best Practices & Strategy Sessions

1:00 pm

Revenue Management & Price Optimization

Enhance revenue recognition through the application of advanced financial intelligence

- Maximize profitability through optimal pricing
- Develop a system for driving revenue, managing pricing and enhancing profitability
- Improve decisions related to pricing, discounting, promotions and demand forecasting
- Understand business drivers influencing price, cost and profit
- Implement information based decision making for improved revenue management

2:15 pm

Reporting Planning and Analysis

Develop accurate and timely reports for improved decision making

- Manage information flow across departments and project for reduced cycle time
- Integrate and consolidate data intensive reports
- Utilize ad hoc, drill down, web and self service reporting
- Link reporting to forecasting for improved financial planning
- Create transparency and accountability for enhanced stakeholder buy-in

3:30 pm

Financial Intelligence Panel: The Evolution of Financial Management

Analytical insight and the growth of the FP&A function

- Uncover best practices in FP&A from leading organizations
- Analyze ROI, functional performance and aspects of added value to your organization
- 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

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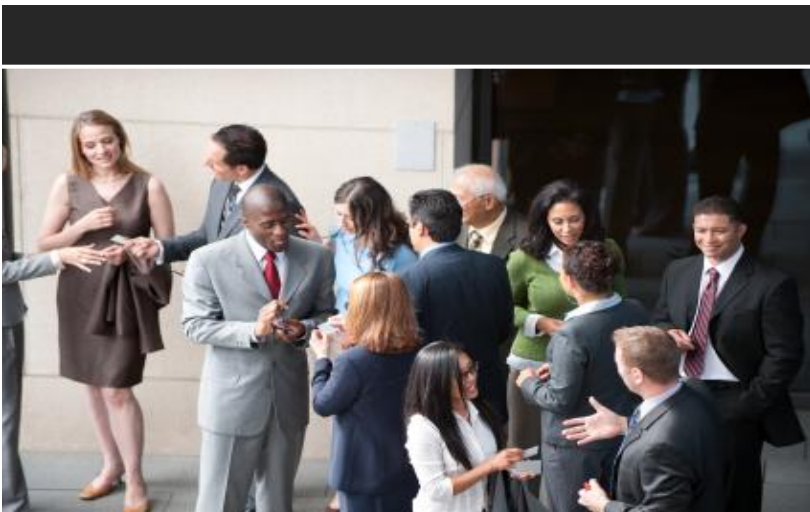
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Networking Opportunities

Not only do attendees come to learn innovative skills and best practices in marketing planning, they also come to meet with peers from different industries across the nation. 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

Three business analytics events are being held simultaneously, focusing on marketing, financial and workforce planning and analysis. The combined networking event offers a great chance to learn from peers and discuss issues and initiatives that drive better performance.

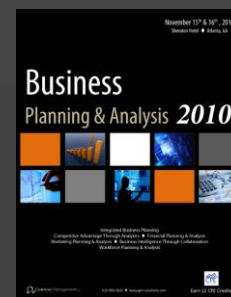


You're Part of a Big Event

Business Planning & Analysis 2010 is a three-in-one event, combining Marketing Planning & Analysis, FP&A and Workforce Planning & Analysis. Each functional focus has its own separate track, giving attendees the opportunity to sit in and learn from those sessions that are of most interest.

Mornings will begin with plenary keynote addresses from some of the nation's top corporate strategic planners and innovative minds focusing on business analytics. Following these keynote sessions, attendees will then choose a the track that is most relevant to their interest or roll. Each of the three tracks will provide case studies and in-depth learning sessions exploring the topics most relevant to that functional area.

This three-in-one event is a very unique opportunity for those looking to expand their knowledge of corporate planning through analytics.



[Click for full brochure](#)

Atlanta

Area, Venue & Travel Information



Earn CPEs

CPE Credits: 12

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

Area – Atlanta, GA

Located in the heart of downtown Atlanta, our venue is conveniently positioned to access the best of what the city has to offer. Close to some of the city's best restaurants and attractions will ensure that attendees will enjoy their experience away from the conference as well.

Hotel and Accommodation Facilities

Our venue's prime location offers dozens of choices of accommodations from boutique to internationally recognized brands. We have special attendee rates available at summit location: **The Sheraton Hotel Atlanta.**

Travel

Most guests will arrive via Hartsfield-Jackson Atlanta International Airport. The venue is located approximately 15 minutes by car or shuttle. Once downtown, amenities are accessible via a short walk or by MARTA, Atlanta's public transportation system.

Summit Venue – The Sheraton Hotel Atlanta

Venue Address:

**The Sheraton Hotel Atlanta
165 Courtland Street, NE
Atlanta, GA 30303**



Room Rate

\$ 159.⁰⁰ / night

Reservations: **1.800.325.3535**

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



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.

Fees ♦ Registration

<input type="checkbox"/>	Early Registration	\$ 1,599.00
<input type="checkbox"/>	Standard Registration	\$ 1,799.00
<input type="checkbox"/>	3 Attendee Group Rate	\$ 3,995.00
<input type="checkbox"/>	Additional Attendee	\$ 1,299.00

For "Early Registration", register by August 13, 2010

Call

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Online

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For group discounts, packages and local information please email Josh Powell:

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