

August 15th & 16th, 2011
San Francisco, CA

Financial Intelligence Forum

FP & A 2011



Strategic Financial Planning
Budgeting & Forecasting
Evidence Based Decision Making
Performance Analysis
Financial Modeling and Revenue Forecasting
Data Management and Delivery
Sales and Operations Finance



Program Agenda

Monday, August 15th; Day One

8:00 am Registration and Orientation

8:30 am Keynote:
FP&A: Driving Optimal Financial Decisions
Leverage financial planning & analysis to enhance strategic decision making in your organization

9:45 am Keynote:
Standardized FP&A Processes
Develop consistent forecasting, budgeting, reporting and analysis

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

Noon Networking Lunch

1:00 pm **Budgeting Management System**
Transform the budgeting process: budget entry, monitoring and re-forecasting

2:15 pm **Planning, Budgeting and Rolling Forecasts**
Rethinking the budgeting and forecasting process utilizing best practices and driver-based modeling

3:30 pm **Communication and Integration**
"Making Change Stick" to drive performance and accountability

4:30 pm Adjourn

Tuesday, August 16th; Day Two

8:00 am Registration and Orientation

8:30 am Keynote:
Competitive Advantage through FP&A
A snapshot of FP&A driving better decision making, reducing costs and optimizing profitability

9:45 am Keynote:
Financial Performance Analysis
Utilize KPIs and performance drivers to improve financial and operational results

11:00 am **Continuous Improvement for FP&A**
Integrate six sigma and process improvement concepts into financial planning and analysis

Noon Networking Lunch

1:00 pm **Data Consolidation and Aggregation**
Reduce time and improve accuracy of data collection

2:15 pm **Finance Business Partner**
Results oriented financial planning and analysis to drive business growth

3:30 pm Adjourn

This conference was the best that I have ever attended. Very well done, and highly useful and relevant material.

- Director of Finance, Computer Hardware Company

FP&A 2011 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.

The 2011 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

FP&A 2011

Attendees will instantly realize the difference between this forum and other conferences. **There are NO sales pitches.** Presentations will be conducted by the most talented experts both regionally and nationally. FP&A 2011 is designed to maximize the learning and networking experience for FP&A professionals, managers, directors and analysts.

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*

FP&A

3 Attendee Team Rate

\$ 3,995

Additional Group Discounts
Are Available



Day One:

Keynote Case Studies & Best Practices



8:30 am

Keynote: FP&A: Driving Optimal Financial Decisions

Leverage financial planning & analysis to enhance strategic decision making in your organization

- 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

9:45 am

Keynote: Standardized FP&A Processes

Develop consistent forecasting, budgeting, reporting and analysis

- Framework for incorporating industry standards and best practices
- 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

11:00 am

Strategic Financial Planning

Link financial planning to strategic planning to optimize resource allocation

- 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



Day One:

Best Practices & Strategy Sessions

1:00 pm

Budgeting Management System

Transform the budgeting process: budget entry, monitoring and re-forecasting

- Expand the notion of budgeting from a control mechanism to a strategic tool
- Leverage consolidated, flexible and accurate data for effective decision making
- Improve financial information flow across your organization
- Develop analytical capabilities in your budget monitoring and re-forecasting processes

2:15 pm

Planning, Budgeting and Rolling Forecasts

Rethinking the budgeting and forecasting process utilizing best practices and driver-based modeling

- Improved and standardized data collection techniques
- Align budgeting to strategies and effectively allocate resources
- Achieve organizational buy-in to budget based decision making
- Develop a methodological approach to budgeting and forecasting
- Implement tools for improved predictability and rolling forecasts

3:30 pm

Communication and Integration

"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
- Assist departments and business units track and achieve their performance

Day Two:

Keynote Case Studies & Best Practices



8:30 am

Keynote: Competitive Advantage through FP&A

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

- 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 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

11:00 am

Continuous Improvement for FP&A

Integrate six sigma and process improvement concepts into financial planning 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



Day Two:

Best Practices & Strategy Sessions

1:00 pm

Data Consolidation and Aggregation

Reduce time and improve accuracy of data collection

- Develop time efficient and cost effective data gathering strategies
- Consistently extract, analyze and collate data from a variety of sources
- Identify and evaluate process improvement methodologies for data collection
- Implement controls to ensure data flow and integrity
- Cascade strategies across functions and departments to ensure successful execution

2:15 pm

Finance Business Partner

Results oriented financial planning and analysis to drive business growth

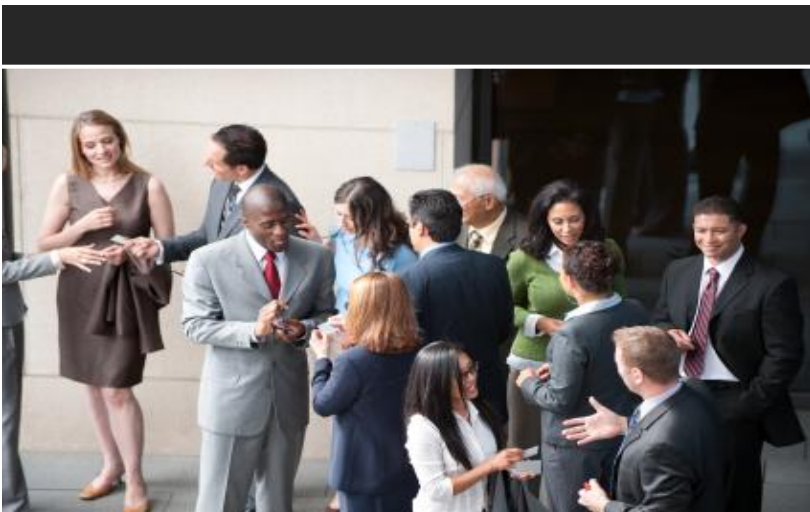
- Provide financial leadership and budget management to the sales organization
- Implement and manage revenue forecasting processes
- Conduct revenue analysis and reporting for sales finance or senior management
- Provide decision support for pricing, revenue recognition and cash flow modeling
- Collaborate and partner with sales operations to drive efficient systems and processes.

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 an array of backgrounds and disciplines.

Network with colleagues and industry experts from different analytical functions

This unique networking opportunity enhances attendees experience both on site and through subsequent relationships built at the event.



Attendees from these companies have attended past Planning & Analysis events:

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

San Francisco

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 – San Francisco, Union Square

Located on San Francisco's historic Union Square, our venue is located in the heart of the city's shopping, restaurant, accommodation and entertainment epicenter. 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 prime location offers dozens of choices of accommodations from boutique to internationally recognized brands.

Travel

There are two convenient airports to serve attendees; San Francisco and Oakland International. Both have convenient public transportation by way of BART. Take BART from either airport toward Downtown San Francisco where you will exit at Powell Street Station. Use the accompanying map to walk or cab the 1 block to our venue

Venue – Palace Hotel San Francisco

Palace Hotel

**2 New Montgomery Street
San Francisco, CA 94105**



Room Rate

\$ 199.⁰⁰ / night

Reservations: **(415) 512-1111**

*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=1105031693&key=9CA1B>



FP&A 2011

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 May 27, 2011

Call

510-984-3026

Fax

510-380-7377

Online

www.gmi-solutions.com

For group discounts, packages and local information please email Alex Smith:

asmith@gmi-solutions.com