

Financial Intelligence Forum

# FP & A 2011



Budgeting & Forecasting  
Integrated Business Planning  
Performance Analysis  
FP&A Communication & Integration  
Price & Margin Analysis  
Data Translation & Delivery  
Developing a Centralized FP&A Unit



Earn 12 CPE Credits



# Program Agenda

Monday, April 18<sup>th</sup>; Day One

8:00 am Registration, orientation and continental breakfast

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

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

10:30 am Networking Break

11:00 am **FP&A: Driving Optimal Financial Decisions**  
*Leverage financial planning & analysis to enhance strategic decision making in your organization*

Noon Lunch & Networking Break

1:00 pm **Strategic Financial Planning**  
*Link financial planning to strategic planning to optimize resource allocation*

2:15 pm **Budgeting, Forecasting and Reporting**  
*Implement innovative models for improved budgeting, forecasting and reporting*

3:30 pm **Financial Performance Analysis**  
*Utilize KPIs and performance drivers to improve financial and operational results*

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

Tuesday, April 19<sup>th</sup>; Day Two

8:00 am Registration, orientation and continental breakfast

8:30 am Keynote:  
**Advanced Analytics**  
*Decision making based on facts, data and analytical insight*

9:30 am Keynote:  
**Data Translation, Interpretation and Delivery**  
*Deliver meaningful information to drive better business decisions*

10:30 am Networking Break

11:00 am **FP&A Operating Model**  
*An inside look at the Corporate, BU and product level FP&A organizational chart at a leading company*

Noon Lunch & Networking Break

1:00 pm **Process Improvement for FP&A**  
*Develop consistent forecasting, budgeting, reporting and analysis*

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

3:30 pm **Adjourn**

Past Presenter Organizations Include



blue of california



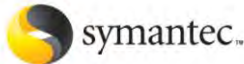
Genentech  
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SUNTRUST



WELLS FARGO



WRIGLEY

YAHOO!



InterContinental Hotels Group



# FP&A 2011

Financial Planning & Analysis 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.

## 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

3 Attendee Group Rate

**\$ 3,995.<sup>00</sup>**



Day One:

# Keynotes 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 sales and operations 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

11:00 am

## **FP&A: Driving Optimal Financial Decisions**

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

- Effective analysis that allows senior management to make more informed decisions
- Decision support aligned to business needs and objectives
- Leverage knowledge of key financial measures to optimize performance
- Evaluate contribution margins, operating margins and cash flows for improved ROI
- Apply environmental analysis to uncover future opportunities and risks



Day One:

# Best Practices & Strategy Sessions

1:00 pm

## 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

2:15 pm

## Budgeting, Forecasting and Reporting

*Implement innovative models for improved budgeting, forecasting and reporting*

- 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

3:30 pm

## 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

Day Two:

# Keynotes Case Studies & Best Practices



8:30 am

## **Keynote: Advanced Analytics**

*Optimize performance through the implementation and integration of advanced analytics*

- 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

9:30 am

## **Keynote: Data Translation, Interpretation and Quality Analysis**

*Develop meaningful interpretations and recommendations to drive business decisions*

- Developing cross-functional support to align people, process, data, metrics and technology
- Implement controls to ensure data flow and integrity
- Cascade strategies across functions and departments to ensure successful execution
- Identify and evaluate process improvement methodologies for data collection and delivery
- Consistently extract, analyze and collate data from a variety of sources

11:00 am

## **FP&A Operating Model**

*An inside look at the Corporate, BU and product level FP&A organizational chart at a leading company*

- Leverage FP&A to provide holistic, evidence-based, strategic decision support
- Incorporate processes to ensure effective use of financial resources
- Integrate analyst activities to drive improvements and best practices
- Gain insight across the organization by aligning resources and improving information flow
- Drive business excellence through collaboration and analysis



Day Two:

# Best Practices & Strategy Sessions

1:00 pm

## 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

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 across analytical functions.

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

Five business analytics tracks are being held simultaneously, focusing on S&OP, data management, 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.



## FP&A 2011

Gateway Management is a recognized leader in providing premier training on strategic planning through analytical insight. 2010 attendee companies include:

Chipotle Mexican Grill	Metaswitch
Express Scripts	Direct Energy
Sara Lee	Crowe Paradis Services
facebook	Kobie
Hamilton Beach Brands, Inc.	Lonza
Salt River Project	Zodiac Pool Systems
Toyota	Beekley
Research in Motion	FL Smidth
Kaiser Permanente	Copa Airlines
Qualcomm	Access Pass & Design
Roche	AHIMA
Juniper	Ametek
Wells Fargo	BitTorrent Inc.
Maxwell Technologies	Bryant Rubber
Arup	Colorado Technical University
YSU	Cross Country Home Services
Abraxas Energy Consulting	F5
Bonneville Environmental	Genomic Health
Infinity Pharmaceuticals	GreenRoad Technologies
Medicis	Jacksonville Aviation Authority
Belo	Life Technologies Corporation
Tempur Pedic	Lyris
eSource	Majestic Steel
Genentech	Maxygen, Inc.
Lithia	Milestone AV Technologies
Citrix	Redwood Trust
Palm	Transtector Systems, Inc.
Southwest Airlines	URS
PayPal	Wafergen Bio-Systems, Inc.
Ernst & Young	ZIN Technologies, Inc.
Symantec	Resource Planning Solutions
IAC	OnBase
Arrow Electronics	Security Benefit
Blue Shield of CA	Intcomex
Apple	Occam Networks
PG&E	Unified TelData Inc
Jones Hearing	JAKKS
UHC	Tibco
Rack Space	Radian
Cummins	3ds
Nike	Hardie's Fruit and Vegetable
NetApp	Merisant
Eon US	MRC
Cadence	Accuray Incorporated
Intuit	RDO Equipment Co.
Price Waterhouse Coopers	Bazaar Voice
Adobe Systems	Microsoft

# FP&A 2011

is one component of a functionally integrated, 5-track event



FP&A 2011



Marketing Planning & Analysis 2011



Sales and Operations Planning & Analysis 2011



Workforce Planning & Analysis 2011



Data Management Planning & Analysis 2011

(Click an image to access full brochure)

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

Chicago

# Area, Venue & Travel Information



Room Rate

**\$ 189.<sup>00</sup> / night**

Reservations: (312) 332-1200

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

Online Reservations: [Gateway Management, Inc.](#)

## Area – Chicago

Located in **Chicago's Downtown**, our venue is located in the heart of the city's shopping, restaurant, accommodation and entertainment epicenter. Gateway Management can assist you with information regarding **the area's best** restaurants, hotels and shows to maximize your experience outside the Summit.

## Hotel and Accommodation Facilities

Gateway Management extensively reviews conference venues, choosing those that offer the best value to business travelers. We aggressively negotiate hotel rates at the venue location to offer maximum on-site convenience at the best price. Furthermore, our **venue's prime location offers dozens of choices of** off-site accommodations from boutique to internationally recognized brands.

## Travel

Most guests will arrive via **Chicago O'Hare International Airport** or **Chicago Midway International Airport**. The venue is located approximately 20 minutes by car or shuttle. Once downtown, amenities are accessible via a short walk, taxi or public transportation.

## Venue – "W" Chicago City Center

Venue Address:

**"W" Chicago City Center**  
**172 West Adams**  
**Chicago, IL 60603**



## 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](http://www.nasba.org).

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



# 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

Early Registration \$ 1,599.00

Standard Registration \$ 1,799.00

3 Attendee Group Rate \$ 3,995.00

Additional Attendee \$ 1,299.00

For "Early Registration", register by January 28, 2011

## Call

510-984-3620

## Fax

510-380-7377

## Online

[www.gmi-solutions.com](http://www.gmi-solutions.com)

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

[asmith@gmi-solutions.com](mailto:asmith@gmi-solutions.com)