

January 31st & February 1st
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, January 31st Day One

8:00 am	Registration and Orientation
8:30 am	Keynote: FP&A: Driving Optimal Financial Decisions <i>Leverage financial planning & analysis to enhance strategic decision making in your organization</i>
9:45 am	Keynote: Competitive Advantage through FP&A <i>A snapshot of FP&A driving better decision making, reducing costs and optimizing profitability</i>
11:00 am	Strategic Financial Planning <i>Link financial planning to strategic planning to optimize resource allocation</i>
Noon	Networking Lunch
1:00 pm	Budgeting Management System <i>The budgeting process in a multi-layered organization</i>
2:15 pm	Finance Business Partner <i>Results oriented financial planning and analysis to drive business growth</i>
3:30 pm	Financial Performance Analysis <i>Utilize KPIs and performance drivers to improve financial and operational results</i>
4:30 pm	Adjourn

Tuesday, February 1st; Day Two

8:00 am	Registration, orientation and opening remarks
8:30 am	Keynote: FP&A Operating Model <i>An inside look at the Corporate, BU and product level FP&A organizational chart at a leading company</i>
9:45 am	Keynote: Standardized FP&A Processes <i>Develop consistent forecasting, budgeting, reporting and analysis</i>
11:00 am	Data Aggregation, Translation and Delivery <i>Deliver meaningful information to drive better business decisions</i>
Noon	Networking break, lunch and open gallery
1:00 pm	Budgeting, Forecasting and Reporting <i>Transform the budgeting process: budget entry, monitoring and re-forecasting</i>
2:15 pm	Communication and Integration <i>Achieve and monitor performance by promoting financial awareness</i>
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

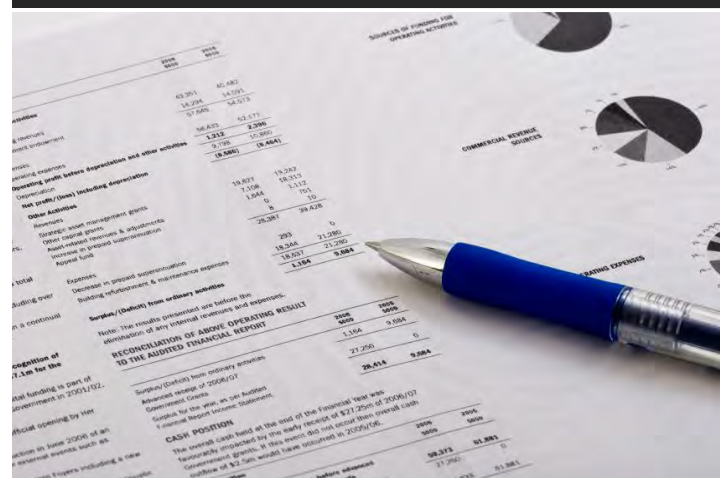
Expert practitioners and methodologists across industry sectors

Networking opportunity to meet with colleagues and industry experts

FP&A

3 Attendee Team Rate

\$ 3,995



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: 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

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

The budgeting process in a multi-layered organization

- 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

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.

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:

Keynote Case Studies & Best Practices



8:30 am

Keynote: 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

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

Data Consolidation, Translation and Delivery

Deliver meaningful information to drive better business decisions

- Provide requirements that define essential information/KPI's needed
- Foster partnership with IT support teams
- Define process controls & validations to ensure data integrity
- **Develop timely, accurate and "certified" reports**
- Ensure information is accessible through multiple mediums (Portal, Mobile Devices)



Day Two:

Best Practices & Strategy Sessions

1:00 pm

Budgeting, Forecasting and Reporting

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

Communication and Integration

Achieve and monitor performance by promoting financial awareness

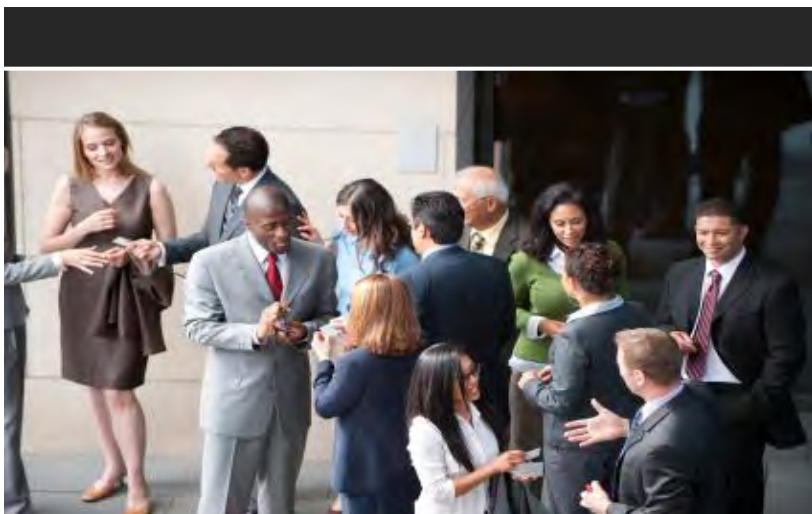
- Maximize the liaison role between finance and executive decision makers
- Incorporate financial planning and analysis throughout the organization
- Translate financial data to engage employees and attain improved buy-in
- Provide access to information to promote accountability and transparency
- Assist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

Networking Opportunities

Not only do attendees come to learn innovative skills and best practices in managerial finance, they also come to meet with peers from different industries across the nation. Keeping this in mind, we have chosen the most unique, tasteful and thought provoking environment available in San Francisco to enhance the experience.

Network with colleagues and industry experts in one of the nation's most esteemed art galleries.

John Pence Gallery is located in the heart of the city, exhibiting classical American realist paintings in this expansive pavilion. During this reception, guests are offered the opportunity to peruse the collection and mingle with colleagues and presenters. A representative will be on hand to answer any questions about the city, the conference or the art.



Represented Companies

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

Chipotle Mexican Grill
Express Scripts
Sara Lee
facebook
Hamilton Beach Brands, Inc.
Salt River Project
Toyota
Research in Motion
Kaiser Permanente
Qualcomm
Roche
Juniper
Wells Fargo
Maxwell Technologies
Arup
YSU
Abraxas Energy Consulting
Bonneville Environmental
Infinity Pharmaceuticals
Medicis
Belo
Tempur Pedic
eSource
Genentech
Lithia
Citrix
Palm
Southwest Airlines
PayPal
Ernst & Young
Symantec
IAC
Arrow Electronics
Blue Shield of CA
Apple
PG&E
Jones Hearing
UHC
Rack Space
Cummins
Nike
NetApp
Eon US
Cadence
Intuit
Price Waterhouse Coopers
Adobe Systems

Metaswitch
Direct Energy
Crowe Paradis Services
Kobie
Lonza
Zodiac Pool Systems
Beekley
FL Smidth
Copa Airlines
Access Pass & Design
AHIMA
Ametek
BitTorrent Inc.
Bryant Rubber
Colorado Technical University
Cross Country Home Services
F5
Genomic Health
GreenRoad Technologies
Jacksonville Aviation Authority
Life Technologies Corporation
Lyris
Majestic Steel
Maxygen, Inc.
Milestone AV Technologies
Redwood Trust
Transtector Systems, Inc.
URS
Wafergen Bio-Systems, Inc.
ZIN Technologies, Inc.
Resource Planning Solutions
OnBase
Security Benefit
Intcomex
Occam Networks
Unified TelData Inc
JAKKS
Tibco
Radian
3ds
Hardie's Fruit and Vegetable
Merisant
MRC
Accuray Incorporated
RDO Equipment Co.
Bazaar Voice
Microsoft

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 access to all that San Francisco has to offer. We have scouted locations throughout the city and find that the InterContinental San Francisco offers among the best accommodations that we can facilitate at our negotiated rate.

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 4 blocks to our venue



Room Rate

\$ 179.⁰⁰ / night

Reservations:

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

Venue – Intercontinental San Francisco Hotel

Venue Address:

**Intercontinental San Francisco Hotel
888 Howard Street
San Francisco, CA 94103**



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 December 10, 2010

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