

May 14 – 16, 2012
InterContinental Hotel ❖ Atlanta

GAN
Gateway Analytics Network

Business Planning & Analysis

FP&A 2012



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



Earn 13 CPE Credits

Agenda



Day One – May 14, 2012

8:30 am	<i>Keynote:</i> Competitive Advantage Through Analytics <i>Harness analytics to promote better strategic planning and drive execution</i>
9:45 am	<i>Keynote:</i> Integrated Strategic Planning <i>Improve organizational performance with cross functional enterprise planning</i>
11:00 am	FP&A: Driving Optimal Financial Decisions <i>Leverage financial planning & analysis to enhance strategic decision making in your organization</i>
12:00 pm	Lunch and Networking Break
1:00 pm	Financial Modeling and Planning <i>Creating a data foundation for financial modeling</i>
2:15 pm	Integrated Planning and Budgeting <i>Utilize KPIs and performance drivers to improve financial and operational results</i>
3:30 pm	The Process of Financial Analysis <i>Leverage financial analysis processes to enhance strategic decision making in your organization</i>
4:30 pm	Networking Reception

Day Two – May 15, 2012

8:30 am	<i>Keynote:</i> Analytics Enablement and Deployment <i>Create a governance, usage and accountability system that aligns to strategic, analytics-based objectives</i>
9:45 am	<i>Keynote:</i> Evidence-Based Decision Making <i>How data-based insight facilitates planned change</i>
11:00 am	Financial Performance Analysis <i>Utilize KPIs and performance drivers to improve financial and operational results</i>
12:00 pm	Lunch and Networking Break
1:00 pm	Financial Forecasting and Rolling Forecasts <i>Maximize continuous “driver-based” planning to keep your forecasts current and accurate</i>
2:15 pm	Continuous Improvement for FP&A <i>Integrate six sigma and process improvement concepts into financial planning and analysis</i>
3:30 pm	Adjourn

510-984-3620 ♦ www.gmi-solutions.com
For group rates or detailed speaker information contact
Alex Smith: asmith@gmi-solutions.com


www.gmi-solutions.com
510-984-3620

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.

- *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

\$ 3,999

FP&A 2012

Recent Presenters Include:



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Marketing Analysis
Workforce Planning
Predictive Analytics & Insights
Financial Planning & Analysis

Business Planning & Analysis 2012



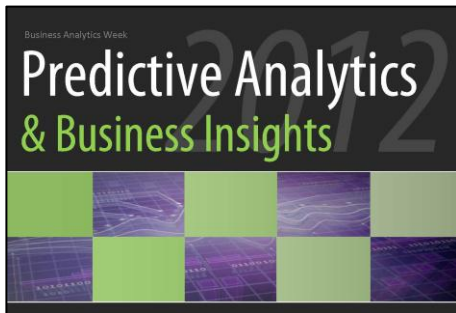
Integrated Strategic Planning
Competitive Advantage through Analytics
Advanced Analytics
Data Translation, Interpretation & Delivery
Performance Analysis
Predictive Analytics & Business Insights

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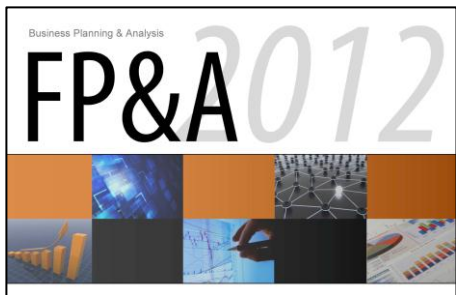
Be part of an integrated, four-track analytics event!

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.

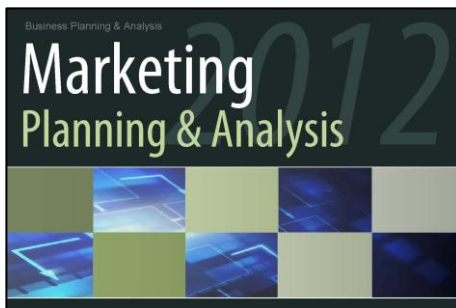


Registered attendees at any of these events are entitled to attend sessions across all programs at **Business Planning & Analysis**

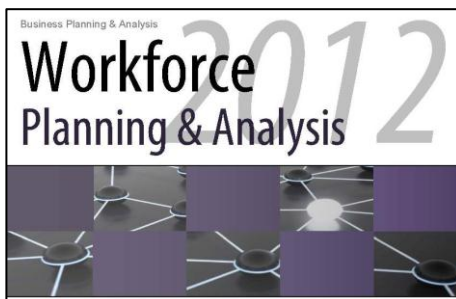
Predictive Analytics and Business Insights 2012 offers tools and unique perspective on how businesses are leveraging analytics to develop better business and customer insights, forecasting capabilities and manage risk.



FP&A 2012 promotes thought leadership and skill building on topics related to budgeting, forecasting and superior financial planning through the use of analytics.



Marketing Planning & Analysis 2012 focuses on optimizing how marketers target their customers, gain insight, gauge ROI and performance, and maximize marketing spend through the use of analytical insight.



Workforce Planning & Analysis 2012 enables business planners to effectively manage talent, engage in workforce planning, and leverage analytics for superior human capital management.

For additional information on Business Planning & Analysis:

Call Alex Smith at: 510-984-3026
Or email at: asmith@gmi-solutions.com

Day One:

Keynotes, Case Studies
& Best Practices



8:30 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

9:45 am

Keynote:

Integrated Strategic 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



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

1:00 pm

Financial Modeling and Planning

Creating a 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

2:15 pm

Integrated Planning and Budgeting

10 Step continuous improvement, problem-solving case study

- 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

3:30 pm

The Process of Financial Analysis

Leverage financial analysis processes to enhance strategic decision making in your organization

- Best practices for FP&A departments to evaluate and present financial analysis
- 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



8:30 am

Keynote:

Analytics Enablement and Deployment

Create a governance, usage and accountability system that aligns to strategic, analytics-based objectives

- Develop an effective data management system that promotes stewardship and governance
- Simplify analytics to make predictive and advanced analytics tools available to a broader audience throughout the organization
- Create a framework that aligns reporting and analytics to organizational objectives
- Organize analytics teams to ensure efficiency in the analytics and reporting processes

9:45 am

Keynote:

Evidence-Based Decision Making

How data-based insight facilitates planned change

- Bridge the gap between knowledge and action
- Aggregate and analyze data to make more effective strategic decisions
- Optimize the quantity and quality of useful information
- Implement evolving techniques to help drive effective strategy planning and execution
- Leverage technology for improved accuracy, deeper business knowledge and real time decision making

11:00 am

Financial Performance Analysis

Utilize KPIs and performance drivers to improve 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

1:00 pm

Financial Forecasting and 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

2:15 pm

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

Workshops

Rolling Forecasts Workshop

Half-day workshop 9:00 – 12:00pm

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:

Course Learning Objectives:

- 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

Business Analytics Workshop

Half-day workshop 9:00 – 12:00pm

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



Workshops

Continuous Improvement Workshop

Full-day workshop 9:00 – 4:00pm

This comprehensive workshop focuses on Continuous Improvement (CI) fundamentals, best practices and tools to drive sustained competitive advantage at your organization. With six learning modules, Continuous Improvement Workshop will you gain a working knowledge of Continuous Improvement, understand the need for a learning organization and develop a relationship between innovation and good growth.

Course Learning Objectives:

i. Introduction to Continuous Improvement

- ✓ What is Continuous Improvement
- ✓ How Lean Six Sigma and Project Management assist in Continuous Improvement
- ✓ Introduce a sample Case Study – students to work in groups across the 6 units to develop content specific solutions throughout the 6 units

iii. Aligning Organizational Culture and Organizational Dynamics

- ✓ Organizational Mission
- ✓ Developing Mission congruent organizational culture
- ✓ Cultural Dimensions and resulting Organizational Dynamics

v. Change Management and Organizational Development

- ✓ Inevitability of change
- ✓ Need for Change Management (CM) and Organizational Development (OD)
- ✓ Pro-active & Planned Changed .vs. Reactive & Forced Change
- ✓ Images of Change across anticipated and unanticipated change

ii. Innovation and Sustained Competitive Advantage

- ✓ Environmental Forces impacting businesses
- ✓ Developing Sustained Competitive Advantage for long-term economic Value
- ✓ Innovation to remain on the leading edge

iv. Strategy Focused Good Growth

- ✓ Organizational Strategy with mission congruence
- ✓ Authenticity and Reputation
- ✓ Need for Good Growth
- ✓ Developing Customer Loyalty, Employee Loyalty, and Good Governance for Stakeholder confidence

vi. Building a Learning Organization

- ✓ What is a Learning Organization?
- ✓ Value of building a Learning Organization
- ✓ Institutionalization of lessons learned
- ✓ Pulling it all together to drive strategy focused good growth to realize sustained competitive advantage and become a market/industry leader

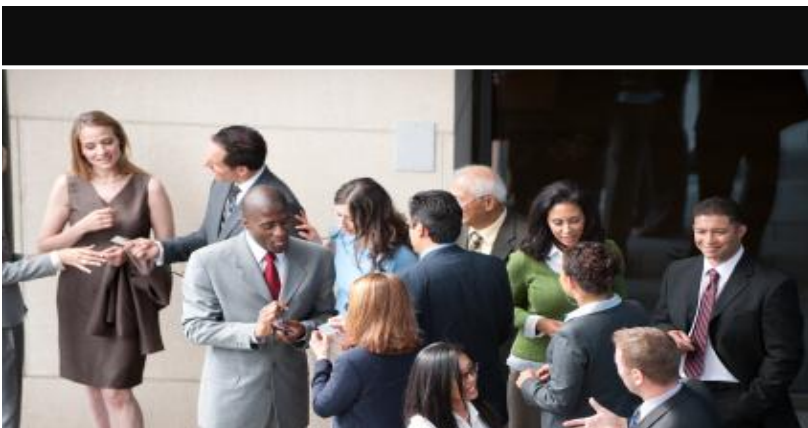


A unique Networking Opportunity

Not only do attendees come to learn innovative skills and best practices in business planning, 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

Five business analytics events are being held simultaneously, focusing on FP&A, marketing, predictive analytics and insights, and workforce management. The combined networking event offers a great chance to learn from peers and discuss issues and initiatives that drive better performance.



This is a cross-functional, cross-industry event. Attendees from the following companies have found value in attending past Planning & Analysis events:

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

Atlanta

Area, Venue & Travel Information



Earn CPEs

CPE Credits: 13

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 the Buckhead in uptown Atlanta, our venue is conveniently positioned to access the best of what the city has to offer. Close proximity 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: **InterContinental Buckhead Atlanta**



Room Rate

\$ 175.⁰⁰ / night

Reservations:

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

Online:

<http://www.ichotelsgroup.com/intercontinental/en/gb/locations/ATLBH?groupCode=H8S>

Travel

Most guests will arrive via Hartsfield-Jackson Atlanta International Airport. The venue is located approximately 25 minutes by car or shuttle.

Summit Venue – InterContinental Buckhead Atlanta

Venue Address:

InterContinental Buckhead Atlanta
3315 Peachtree Road NE
Atlanta, GA 30326





Registration & Contact Information

Attendee Information

Attendee Name

Title Organization

Email Phone Number

Additional Attendee Name

Title Email

Additional Attendee Name

Title Email

Payment Information

Check/Purchase Order

Credit Card

Name on Card

Card Number

Expiration Date CV2 (card verification number)

Billing Address

City/State/Zip

Pay By Check:

Checks should be made payable to Gateway Management. The mailing address for checks and tax forms is:

Gateway Management
2625 Alcatraz Avenue, #341, Berkeley, CA 94705

Cancellation/Rescheduling Policy:

All cancellations 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 Altamont Group programs.

FP&A 2012 Fees

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

Business Planning & Analysis Add-On Options

<input type="checkbox"/>	Rolling Forecasts half-day Workshop	\$ 399. ⁰⁰
<input type="checkbox"/>	Business Analytics half-day Workshop	\$ 399. ⁰⁰
<input type="checkbox"/>	Continuous Improvement Full-day Workshop	\$ 899. ⁰⁰

For "Early Registration", register by February 24, 2012

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