

February 7 - 8, 2012
San Francisco, CA

Business Analytics Week

FP&A 2012



Budgeting & Forecasting ● Financial Modeling & Planning
FP&A to Drive Business Growth ● Communication & Integration
Continuous Improvement ● Financial Performance Analysis
FP&A Innovation

Agenda



February 7, 2012

8:30 am

Keynote: Competitive Advantage through FP&A

A roadmap for FP&A to improve business analysis, drive better decision making and enhance strategic alignment

Bob Paladino – Founder at **Bob Paladino & Associates**

9:45 am

Keynote: Financial Modeling and Planning

Creating a data foundation for financial modeling

Parisa Naserlavi – Finance Director at **Cisco Systems**

11:00 am

Strategic Financial Planning

Link financial planning to strategic planning to optimize resource allocation

Ricardo Dalmas – Senior Director of Strategy at **Pepsi Beverage Company**

12:00 pm

Lunch and Networking Break

1:00 pm

Financial Planning & Analysis to Drive Business Growth

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

Carla Zorn – Director of Financial Transformation at **Intuit**

1:45 pm

Balanced Scorecard for FP&A

A methodological approach to financial measures, metrics and analytics

Bob Paladino – Founder at **Bob Paladino & Associates**

2:30 pm

Finance Business Partnering

Providing business partnership and influence to maximize profitability

Mary Loomas – Sr. Controller at **Intel Corporation**

Amanda Hashfield – Sr. Controller at **Intel Corporation**

3:15 pm

High Performance Driver Based Modeling

Realize the value of streamlining and automating financial planning processes

Curtis Neumann – Associate Director, Corp FP&A at **AT&T**

4:00 pm

Foundations for Rolling Forecasts

Maximize continuous “driver-based” planning to keep your forecasts current and accurate

Sid Ghatak – President at **Rolling Forecast International, Ltd.**

4:30 pm

Networking Reception

Agenda



February 8, 2012

8:30 am

Keynote: **Financial Performance Analysis**
Utilize KPIs and performance drivers to impact financial and operational results
Frank Merchiers – Vice President, Global Finance & Information Delivery
at **InterContinental Hotels Group**

9:45 am

Keynote: **Beyond Process Excellence**
Moving beyond process excellence to becoming The Trusted Leader
David Elrod – Finance Director at **Microsoft**

11:00 am

Advanced Financial Analytics
Financial decision making based on facts, data and analytical insight
Rob Kugel – Sr. Vice President, Research Director at **Ventana Research**

12:00 pm

Lunch and Networking Break

1:00 pm

Change Management for FP&A
“Making Change Stick” to drive performance and accountability
Marco Morescalchi – Sr. Finance and Integration Manager at **Nike**

2:15 pm

FP&A Innovations
Maximize tools and resources available to run and optimize a financial planning program
Ben Lamorte – Vice President at **Alight Planning**

3:30 pm

Adjourn



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13 CPE Credits

FP&A 2012 attendees receive 13 CPE credits for attendance at the full 2-day event. To receive a certificate verifying CPE credits, please send an email to Alex Smith with “CPE” in the subject line to:

asmith@gmi-solutions.com