

7:45am Registration/Breakfast/Ice Breaker/Academy Orientation

Welcome and begin ice breaker games combined with Academy orientation of the Summit and what is expected of participants.

8:30am General Session – Next Generation Finance

90% of Finance groups say they want to “transform” from trusted-score keeper to strategic partner to have a “seat at the table.” This session discusses what that means and value of transformation. Attendees will be introduced to techniques to transform finance from spreadsheet-driven accounting and reporting to a forward-looking Predictive Powerhouse.

9:00am General Session – Roadmap Overview

This session details the roadmap of the 4 components to build the culture of data driven decisions through analytics consisting of Mindset, People, Processes and Systems.

9:45am 15 Minute Networking and Refreshment Break

10:00am General Session – Mindset

Mindset regards a person’s consideration toward affecting decisions. The 4 Mindsets are Reporter, Commentator, Advisor and Strategist. An example of a Reporter is the production of quarterly financials while the Commentator is focused on converting data into information via reports to measure and explain variance to plan. All 4 Mindsets are needed in an organization. However, Mindsets must align to affect a culture of data driven decisions. This session discusses the importance and elements of Mindset.

10:45am General Session – Benchmarking

Improvement comes in steps and this session discusses benchmarking toward data driven decisions. Attendees will learn effective ways to create a baseline, target and measure the steps along the way to assure ROI.

11:15am Workshop – Benchmarking

In this workshop, attendees will work to identify how to establish, perform benchmarking and measure benchmarks and associated corrections along the roadmap.

12:15pm Lunch – Analytics for Job Satisfaction & Career

Eat and be merry! Here we gather for social time and bonding with a presentation on how analytics contributes to career advancement.

1:15pm General Session – People

This session is connected to Mindset enabling attendees to identify characteristics of their current or potential team members for each role of Reporter, Commentator, Advisor and Strategist. This also covers the need for alignment in building the culture for data driven decisions.

2:00pm Workshop – People

This workshop takes participants through the process of assessing people, identifying gaps, preparing roles/responsibilities and assuring alignment.

3:00pm 15 Minute Networking and Refreshment Break

3:15pm General Session – Process

Often the Achilles heel of building “culture”, this session identifies the written processes needed to institutionalize the culture of data driven decisions including data governance, training, and authorities for making decisions and advancing analytics.

4:00pm Workshop – Process

This hands-on workshop helps attendees build the framework for effective written procedures and processes for training, data governance, and authorities.

5:00pm 90 Minute Intermission

6:30pm Attendee Dinner and Refreshments

Eat, drink and be merry! We gather for social time and bonding on our journey to build community that will follow the Academy.

7:45am Ice Breaker – Breakfast – Courses Orientation

Continue ice breaker games combined with orientation of day's courses and what is expected of participants.

8:30am General Session – Systems

This session travels through the various technologies as it applies to each type of Mindset. There is no one "uber" system and the strengths and weaknesses of the systems are explored so that users can bring the right system to the right people.

9:30am 15 Minute Networking and Refreshment Break

9:45am Workshop – DV Tools (Power BI)

The Analytics journey starts with adding visualization to the financial skillset and toolbox. Data Visualization Tools (DV Tools) provide visualization of trends and are most useful in understanding past performance. DV tools assist finance to have a more dynamic conversation with the business as their presentation is no longer a static PowerPoint presentation but live dashboards with opportunities to drill into the details. DV tools is also a way for finance to report more efficient as it eliminates the use of massive excel books where sheets are linked. This session will teach how to use Power BI for comprehensive dashboard reporting, trends analysis and building sensitivity analysis.

11:15am Workshop – Desktop Statistical Tools

When advancing the analytical skillset from focusing on hindsight trends to providing insight and foresight, Desktop Statistical Tools (DS Tools) become useful. DS Tools enable statistical analysis on small data sets. They are cheap (often Excel add-ons) and ready to go out of the box. However, you will need statistical skills to take advantage of their capabilities and, because they are data limited, they will not serve a big data or enterprise environment. This session will teach how to run high level predictions and forecast validation models that enables finance to challenge decision makers.

11:45am Lunch – The Future of Finance and Technology

Eat and be merry! Here we gather for social time and bonding with a presentation on how analytics contributes to career advancement.

12:45pm Workshop – Applications of Analytics and Training

Finance "knows" it wants to implement analytics, but being engulfed with BI, visualization, and spreadsheets tools most users simply do not know the practical applications of analytics. This workshop provides real-life demonstrations of different applications of analytics to train users on how they can employ analytics on their data.

2:00pm 15 Minute Networking and Refreshment Break

2:15pm Workshop – Discovery Visualization & Analytic System

This workshop allows participants to bring their own data to load into Analytic tools to experience the insights and predictions contained in their data and provide a glimpse of the scope of ROI and contributions to data driven decisions.

5:00pm 90 Minute Intermission

6:30pm Attendee Dinner – Refreshments – Panel Discussion: My Analytics Journey

Eat, drink and be merry! We gather for social time and bonding on our journey to build community that will follow the Academy.

7:45am Ice Breaker – Breakfast – Academy Assessment

Continue ice breaker games combined with participants assessment of the Academy.

8:30am General Session – Storytelling

The culmination of an analytics culture is the ability to tell a story that the business can digest toward making decisions. Statistical numbers and complexity too often are not intelligible. Here we discuss how to use visualization and simplification of the complex to deliver understanding of the analytics and to deliver the analytics that matter.

9:00am Workshop – Storytelling with Visualization

This workshop uses the results from the System visualization to construct compelling presentations that drive decisions.

10:00am 15 Minute Networking and Refreshment Break

10:15am Workshop – Storytelling with Analytics

This workshop uses the results from the System analytics to construct compelling presentations that drive decisions.

11:00am Workshop – Selling the Culture of Analytics – Plan, Budget, ROI

This workshop puts the pieces together of developing a plan, budget, and ROI for implementing analytics and the story for a culture of data driven decisions. This crucial workshop helps attendees build the business case for analytics in their organization.

12:00pm Farewell

Here we gather for a tearful farewell to our friends, but, knowing we have made lasting bonds and with a view to return for next year as we advance to the Junior level of the Academy.

12:15pm Adjourn