



Learn.
Connect.
Transform.

2019 FINANCIAL FORECASTING & TRANSFORMATION SUMMIT

MARCH 25-26, 2019
SAN FRANCISCO, CA

7:45am Registration and Breakfast

8:15am Welcome and Opening Comments

8:30am Opening Keynote:

The Revolution of Forecasting

From Weatherman to Engineer – Why You Might Want to Start Updating Your Resume

The Forecasting Discipline has changed dramatically over the past 20 years. What started out as simply a way to better understand the past and trend out the future, has turned into a highly-strategic capability within the enterprise – one which is used to uncover upside potential & efficiencies, and leveraged to engineer organizational success. Technology, innovation, and analytic advances have helped propel the Forecaster into a trusted C-Suite partner. With this evolution comes power, influence, and a seat at the table. An effective strategist helps break down organizational silos, enables data & insight transparency, and helps connect functions in ways unimaginable in the recent past. But it also requires fresh talent, new skills, open-mindedness, and an evolved business acumen. So you better secure your updated train ticket before you get left behind in the station...

Topics to be covered:

The PAST: The Evolution of Forecasting Over the Years

- The Analytic Journey – Improvements over the years
- The types of roles we have played

The PRESENT: Functional Experts & Advanced Capabilities

- Elevated Roles & Responsibilities
- Case Studies: How we leverage analytics

The FUTURE: Strategic Enterprise Leaders

- Evolving Value Proposition
- Innovation – Connecting the Dots
- Tomorrow's Hires

9:30am 15 Minute Networking and Refreshment Break

9:45am (choose from 2 sessions)

Continuous Planning and Rolling Forecasts

Utilize rolling forecasts to adapt to dynamic business challenges and opportunities

- Utilize the advantages of re-forecasting and rolling forecasts
- Maximize continuous “driver based” forecasting to keep your planning current and accurate
- Analyze, interpret and integrate rolling forecast processes across the organization
- Link the forecast to strategic and operational decisions

9:45am (choose from 3 sessions)

Empowering Users with Self Service Business Intelligence

Allowing end users to spend more time analyzing data for their needs

- Creating a company-wide data governance policy to include SSBI
- Cultivate a culture that embraces data-informed decision making
- Encouraging interdepartmental collaboration
- Align technology with the needs and skill levels of the end users

10:45am 15 Minute Networking and Refreshment Break

11:00am (choose from 2 sessions)

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11:00am (choose from 2 sessions)

Utilizing Predictive Analytics to Identify Business Drivers

Predict trends, understand customers, improve business performance, drive strategic decision-making, and predict behavior

- Harness the ability to respond predictively and proactively to customer needs and wants
- Enabling information streams to be accessed, analyzed and shared in real time
- Drive strategic decision-making with insights from predictive analytics models

12:00pm Lunch

1:00pm (choose from 2 sessions)

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.

1:00pm (choose from 2 sessions)

Data Monetization

Organizations around the globe are faced with a deluge of data. There has been significant attention placed on what to do with this data including how to capture it, store it, mine it, and leverage it for better decisions and analytics. What is missing in these discussions is how to unlock the value in the data and use it to fuel growth. As subject matter experts in this space and having worked with dozens of organizations across a wide spectrum of industries we have developed the Data Monetization Maturity Model. This model will help organizations see the potential value that their data holds and is used as a roadmap to plan the Data Monetization Journey. Encompassing 5 key phases from Data Storage, BI & Reporting, Visualization, Predictive Analytics, and AI & Machine Learning, this model will identify the applications of these capabilities and the potential benefit each level brings to the organization. Underlying the model is a focus on helping organizations shift away from cost savings and operational efficiency measures to using data to develop new products, services, and business models to fuel growth. We have seen many organizations falter in their efforts, so we focus on helping organizations “Cross the Chasm” from understanding what happened to powering a model that creates the future. We will identify the key challenges that organizations face in this journey and demonstrate practical solutions that can be deployed today to remedy them. The session will be interactive and cover several case studies of organizations that have made this journey and the tremendous benefits they have achieved as a result.

2:00pm 15 Minute Networking and Refreshment Break

2:15pm (choose from 2 sessions)

Finance as a Strategic Business Partner

Building strategic partnerships with key stakeholders to become more effective leader

- Interpreting, explaining and driving performance within the organization
- Presenting a dynamic industry, competitor and economic context
- Supporting and influencing key operational and strategic decisions
- Advising on key business planning assumptions, trade-offs and opportunities
- Providing ad-hoc analysis and insights on specific issues

2:15pm (choose from 2 sessions)

Data Governance: Creating Value from your Data

Leverage your accessible, trustworthy data to drive new revenues, re-imagine business processes and improve the customer experience

- Align data governance to business strategies and goals
- Establish an operating model for success empowering everyone to use the data to optimize data
- Assemble a data governance team to define and ensure best practices
- Create business-relevant metrics associated with data governance policies

3:15pm 15 Minute Networking and Refreshment Break

3:30pm Closing Keynote:

Collaborative Forecasting and Insights

Establish integrated business planning through synchronized forecasting processes

- Develop, implement, and manage collaborative forecasts
- Establish collaborative planning and forecasting partnerships
- Make transparent, interrelated and aligned business assumptions
- Capitalize on collective knowledge & decision making, while reducing redundancy

5:00pm Networking Reception

DAY 2- TUESDAY, MARCH 26TH, 2019

7:45am Registration and Breakfast

8:15am Welcome and Opening Comments

8:30am Opening Keynote:

Lessons in Analytics and Forecasting from the Analytics Frontier

Many of the best analytics companies in the world come out of the digital space. By combining natural measurability of operations, customer and marketing, digital provides a paradigm for how to do better analytics, how to integrate analytics across silos and how to get that analytics to drive change. Gary Angel created the largest digital analytics consultancy in the U.S., sold it to Ernst & Young, and led the practice there for more than three years. Along the way, he pioneered many of the core techniques that have become common in digital analysis. In this presentation, he'll walk you through the biggest learnings over the course of two decades driving analytics transformation for some of the most sophisticated analytics companies in the world. You'll get key learnings around integrating Voice of Customer and Behavioral data, creating an analytics strategy, doing customer journey mapping right, building test & learn methods into the core of your business, separating forecasting from goals, choosing better KPIs, and even finding ways to build reports that actually drive value. It's a master class in how to do analytics that make a difference.

9:30am 15 Minute Networking and Refreshment Break

9:45am Keynote:

Elevating Teams In Strategy Execution

In ever increasing numbers, CEOs are calling on teams to be "more strategic," but exactly what this means is rarely defined. Strategy execution (M&A, capital expenditures, Marketing & IT investments, Analytics and other tactical initiatives) offers senior leaders opportunities to transform this vague commission into tangible results. In this session, you'll learn how to: Select effective decision specialists, Equip them with techniques that produce better business solutions, and Position your specialists for maximum effectiveness.

10:45am 15 Minute Networking and Refreshment Break

11:00am (choose from 2 sessions)

Building a High-Performing Finance Team

Create a highly adaptive team while fostering a culture of creativity and innovation

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

11:00am (choose from 2 sessions)

Beyond Data Visualization: The Power of Data Storytelling

How to apply Demand Planning Segmentation to improve planning and collaboration

This workshop goes beyond the four boxes of Demand Planning Segmentation and shows you how to use this powerful analytical tool to improve your planning and collaboration efforts. Demand Planning Segmentation is a proven analytical process, and by itself often doesn't return meaningful business results. This workshop will cover what the results mean and what actions to consider. You will learn the core principles of Demand Planning Segmentation, including some simple math, along with how to utilize the outputs to improve your planning and collaboration.



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12:00pm Lunch

1:00pm (choose from 2 sessions)

Financial Modeling and Driver Based Planning

Link financial forecasting to operational drivers and key performance indicators

- 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

1:00pm (choose from 2 sessions)

Anticipate Customers' Future Behavior with Predictive Analytics

2:00pm 15 Minute Networking and Refreshment Break

2:15pm (choose from 2 sessions)

FP&A: Creating Value Through Insight

Leverage financial planning and analysis to provide true business impact

- Understanding FP&A's role in each of the seven different phases of the Decision Making Value Chain
- Breaking through analysis paralysis to insight generation and helping business partners understand the impact on the organization
- Becoming the strongest influencer by supporting executives with data and then guiding the organization through times of uncertainty
- Effectively translating the organization's strategy into action, ultimately driving business success and shareholder value

2:15pm (choose from 2 sessions)

Forecasting and Analytics: From Momentum Techniques to Bottom-up Models

This workshop provides a great introduction to forecasting techniques. It begins with a basic intro into the three types of forecasting models (opinion, momentum, predictive) and when/why you might choose one method or another. Part II dives into basic time-series / momentum techniques for forecasting. It's a straightforward, practical look at different weighting and smoothing techniques for building a forecast. You'll learn why you choose a particular technique and how it works along with simple Excel-based examples. In Part III, we look at a bottoms-up, big data technique for handling a more complex system – this part will focus on CRM analytics. It will include a look at why simple bottom-up approaches to CRM fail, some of the challenges to building models in a complex system like forecasting sales with CRM data, and how model building can be used to support better sales forecasting and deeper knowledge within the organization. Finally, we wrap up in Part IV with some thoughts on the culture and organization of forecasting within the organization.

3:15pm 15 Minute Networking and Refreshment Break

3:30pm (choose from 2 sessions)

Benchmarking for Improved Financial Performance

Gain insight into gaps, opportunities and areas in which your organization can focus on and improve

- Select and prioritize areas in need of improvement based on the strategy of the organization, competitive advantage, the impact of potential improvement and likelihood of success
- Develop a database of accurate, timely and relevant internal data that lead to analysis of current performance against best in class results
- Identify the causes of the current performance gap and eliminate the root causes for excess cost and effort

3:30pm (choose from 2 sessions)

Forecasting and Analytics: From Momentum Techniques to Bottom-up Models (Continued)

This workshop provides a great introduction to forecasting techniques. It begins with a basic intro into the three types of forecasting models (opinion, momentum, predictive) and when/why you might choose one method or another. Part II dives into basic time-series / momentum techniques for forecasting. It's a straightforward, practical look at different weighting and smoothing techniques for building a forecast. You'll learn why you choose a particular technique and how it works along with simple Excel-based examples. In Part III, we look at a bottoms-up, big data technique for handling a more complex system – this part will focus on CRM analytics. It will include a look at why simple bottom-up approaches to CRM fail, some of the challenges to building models in a complex system like forecasting sales with CRM data, and how model building can be used to support better sales forecasting and deeper knowledge within the organization. Finally, we wrap up in Part IV with some thoughts on the culture and organization of forecasting within the organization.

4:30pm Adjourn