FP&A Intensive 2017 Interactive Financial Transformation Summit

October 26-27, 2017 | San Diego, CA

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www.JPKGroupSummits.com
Reasons to Attend

Our forums allow attendees to learn and share best practices, walk away with real-concrete, actionable solutions and expand their professional skill sets. The agenda allows you to choose between multiple break out session options so you and your team can converse and interact with other attendees and presenters. By attending, you and your group will walk away with invaluable-actionable examples, insights and connections that will help you tackle challenges in your current role.

Unique Format

We understand not everyone learns at the same pace or delivery method. Our learning sessions range from 1 hour keynote sessions, to longer workshop sessions and interactive group dialogue and discussion sessions that offer more hands-on, interactive learning. These sessions are designed to help each attendee get the absolute most out of the other attendees and speakers.

What's Included

Along with the excellent learning and networking opportunities, your tuition fee covers a full, hearty breakfast, lunch, snacks and refreshments for both days. Also, stay after the last session on day 1 for our networking reception and relax with drinks while you network with your peers in a vendor-free atmosphere.

LEARN. CONNECT. TRANSFORM.

This intensive 2 day summit provides attendees a chance to dive deep into multiple financial transformation and leadership topics. With most sessions being 2+ hours in duration, attendees and speakers are able to explore multiple examples of challenges and actionable solutions. Everyone at the summit will be involved in extensive dialogue and walk away with valuable information to take back to their organization.

We pride ourselves in providing an unmatched learning atmosphere free of exhibitors or software vendors pushing their products allowing attendees to focus on frameworks, best practices and organizational strategy. The high level of attendee/speaker collaboration and engagement at the summit truly makes this a unique and favorable offering.

Attendees from a wide range of industry and functional backgrounds make it a goal to attend our educational offerings every year. This broad makeup provides exceptional networking opportunities to enhance attendees’ experience at the event, as well as building lasting relationships for continued learning well into the future.
## THURSDAY, OCTOBER 26, 2017 AGENDA

**7:45 am Registration and Breakfast**  
**8:15 am Welcome and Opening Comments**

**8:30 am - 9:30 am Opening Keynote: Future of FP&A**  
This keynote will address the topics of agility as a competitive advantage, the appetite for actionable, real-time analysis, tight integration between financial planning systems and pressure on finance teams to improve their contribution to high-value planning and analysis.

**9:30 am 15 Minute Networking and Refreshment Break**

**9:45 am - 12:15 pm Rolling Forecasts Implementation**  
Executing and implementing a rolling forecast properly will enable an organization to become more agile and dynamic in its business planning process. Though there are many definitions of a rolling forecast, all successful solutions must contain a few core components. Attendees will discuss key questions that they need to ask of themselves as well as learn the 5 core components of a highly effective rolling forecast: extend beyond the calendar year, update on a regular/pre-determined basis, emphasize key business drivers, rapid forecast creation and blend actual performance along with the updated forecast.

**12:15 pm Lunch**

**1:15 pm - 3:15 pm Track A: Developing a Center of Excellence (COE) for Financial Planning & Analysis**  
The FP&A function serves a critical role by delivering relevant and insightful information to top executives to help them make informed business decisions. However, close examination of day-to-day FP&A activities may reveal some inefficiencies. Transactional, low-value-add FP&A activities can be successfully decoupled from the more strategic knowledge-based activities and centralized in an FP&A center of excellence (COE) to support a more cost-effective operating model.

**1:15 pm - 3:15 pm Track B: FP&A Business Partnering**  
In this intensive session, attendees will learn and create dialogue on “what should happen” and “how to execute change” in their organization. Business partnering often includes two important functions: providing the organization finance support to the activities of the business and challenging the status quo focusing on shaping the future strategic direction.

**3:15 pm 15 Minute Networking and Refreshment Break**

**3:30 pm - 5:00 pm Track A: Exploring EPM Solutions with an Unbiased Eye**

**3:30 pm - 5:00 pm Track B: Building a High Performing FP&A Team**  
Finding the right talent, obtaining the necessary resources and shifting the focus of the team to higher value tasks are a major challenge for most FP&A teams. This session will focus on what cultural and technical attributes to look for in future team members, the role of the leader and building a highly adaptive team while fostering a culture of creativity and innovation.

**5:00 pm Networking Reception**
# FRIDAY, OCTOBER 27, 2017 AGENDA

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
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<tr>
<td>7:45 am</td>
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<td>8:30 am – 9:30 am</td>
<td>Opening Keynote: Improving Planning, Analysis &amp; Forecasting with Advanced Analytics</td>
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<td>This keynote uncovers the challenges that organizations face in utilizing performance data, the steps needed to create a baseline budget, the tactics for taking budgeting to the next level through advanced analytics, and the benefits of predictive business solutions.</td>
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<td>9:30 am</td>
<td>15 Minute Networking and Refreshment Break</td>
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<td>9:45 am – 12:15 pm</td>
<td>Next Generation of Cloud FP&amp;A: Simple Collaborative and Real-Time</td>
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<td>Collaboration in Financial Planning and Analysis includes consolidating inputs from multiple sources, analyzing the data, and communicating results that are understood and respected by decision makers. In the past, while users understood the importance of collaboration, they did not have the right tools and technologies to be effective in real time and context of a specific plan or report being analyzed. In this session attendees will learn how to collaborate better with their colleagues and stakeholders in real time, optimize the decision process by providing in-context information to the decision makers, share reports, tasks, and other related information with key stakeholders and build an effective social community to contribute to the FP&amp;A process.</td>
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<tr>
<td>12:15 pm</td>
<td>Lunch</td>
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<td>1:15 pm – 3:15 pm</td>
<td>Transforming FP&amp;A: Integrated FP&amp;A, CI and Performance Management</td>
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<td>Forecasting is used to drive performance, identify opportunities and risks, and communicate with stakeholders. The combination of accurate forecasts and realistic targets produce a forward-looking mindset and is how we know where the business is going. This session focuses on integrating performance management and opportunity management with rolling forecasting, scenario planning, targeting and commercial intelligence. Additionally, this creates a dynamic financial planning and analysis process that connects operational and sales management with financial and strategic decision making in a collaborative and coherent way.</td>
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<td>3:15 pm</td>
<td>15 Minute Networking and Refreshment Break</td>
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<td>3:30 pm – 4:00 pm</td>
<td>Closing Remarks: Rethinking the FP&amp;A Operating Model</td>
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<td>The FP&amp;A function is well placed to help lead the finance leader through strategic processes by leveraging their financial insight, systems capabilities and direct access to operations. However, with the passage of time, ever increasing volume of data, and increased complexity as businesses grow and evolve, the FP&amp;A function can find itself distanced from business front line teams. Optimizing the FP&amp;A operating model can be achieved in a number of ways and in each case should be tailored to each specific business. The closing session will focus on LEAN finance, strategic alignment, technology as an ‘enabler’ and investing in people.</td>
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PRESENTERS

Michael Kanazawa – Partner – Strategy, Innovation and Transformation at EY
Michael is currently Partner - Strategy, Innovation and Transformation at EY where he is focused on bringing the model of blended strategic and design thinking to solve clients’ needs in innovation, strategy and transformation. Michael is also Co-author of BIG Ideas to BIG Results (FT Press - Pearson Hall, 2008), winner of two awards on innovation and business management and localized for multiple global markets.

Adam Sugano – Head of Predictive Modeling and Advanced Analytics at Autodesk
Adam serves as the Head of Predictive Modeling and Advanced Analytics at Autodesk. In this role, he leads a team of both internal and external data scientists charged with delivering innovative, actionable data driven solutions that help empower Autodesk’s customer retention and engagement optimization efforts across the customer lifecycle. Adam holds a B.S. in Mathematics, a M.S. in Biostatistics, and a Ph.D. in Statistics, all from the University of California at Los Angeles.

Jane Riad – Senior Manager, Listening Services Center of Excellence at Cisco Systems
Jane is a seasoned professional driven by passion for achieving excellence in the customer experience. Brining more than 20 years experience leading customer-focused teams to exceed customer expectations. She currently is Senior Manager, Listening Services Center of Excellence at Cisco Systems where she is the global leader responsible for Cisco’s customer and partner listening strategy.

Munish Arora – Consultant at USIS Consults
Munish has over 15 years of experience in analytics spanning multiple industries. Managed diverse analytics solutions portfolio and improved business results. Established advanced analytics capabilities and delivered insights that are understandable and actionable. Trusted adviser for executives and organizations who are transforming and modernizing their business using data and analytics capabilities.

Lynn Hunsaker, Customer Experience ROI Strategist at ClearAction
Former President of Silicon Valley Chapter of American Marketing Association; CXPA CX Expert (1 of 17), CustomerThink Featured Columnist (1 of 12), #3 author on CustomerThink; Author of B2B CEM Best Practices Study, Journey to Marketing Ops Maturity Study, Customer Experience Improvement Momentum, Metrics You Can Manage for Success, and Innovating Superior Customer Experience.

Michel Bernaiche – Director, Program Development at Aurora WDC
Former Chairman of the Board of Directors & Interim CEO at SCIP (Strategic and Competitive Intelligence Professionals); Former Senior Manager Competitive Intelligence at Dunkin' Brands; Former Manager of National Competitive Intelligence at SUPERVALU.
PRESENTERS

Arik Johnson – Founder and Chairman at Aurora WDC
Arik Johnson is Chairman of Aurora WDC, the intelligence advisory firm he founded in 1995. After stepping aside as CEO in late 2009, today Arik serves as Managing Director and lead architect at Aurora’s R&D lab, think tank network and intelligence policy institute, the Center for Organizational Reconnaissance (COR).

Roy Barnes – President Blue Space Consulting
Customer Experience and Performance Management Expert; Former SVP at Marriott Vacation Club International; Author of “Customer Experience For Dummies”

Ed Allison – Managing Partner and Founder at Comelligence, Inc.
Working to change the way companies compete and win, Ed Allison is the Managing Director and co-founder of Comelligence, Inc. a competitive, market and sales intelligence platform. Ed previously served as a competitive team leader at Cisco Systems, Symbol Technologies, Juniper Networks and Polycom. In his most recent engagement, Ed helped Polycom, the leader in video communications, grow from a $1B to a $1.4B annual sales.

Jonathan Rayner – Program manager of Competitive Analysis and Benchmarking at Hewlett-Packard

Ken Porter – Competitive Intelligence Manager at Intuit

Henry Chen – Senior Manager, Data Science at PayPal
Attendee Comments

"I've attended 15+ SCIP/Frost & Sullivan conferences and this has been the most valuable to me. Practical and actionable."

"It was great not having 'vendors' selling/promoting services during breaks or in speaking sessions."

"Relevant topics and diverse but relatable group of speakers."

"Informal dialogue and peer learnings was great! Ability to learn/become aware of new tools and concepts."

Who Should Attend?

Budget & Financial Analysts
CFO
Controller
Corporate Forecasting Manager
Corporate Strategy Manager
CPA
Director of Financial Reporting, Budgeting and Analysis
Director of Forecasting and Revenue Analytics
Director, Corporate FP&A
Director, Financial Reporting Analysis
Finance Manager
Forecast Manager
Forecasting & Planning and Analysis
Head of Financial Planning and Analysis
Lead Financial Analyst, Strategic Development
Manager, Budgeting & Purchasing Operations Finance Manager
President
Project Manager, Finance Strategy
Sales Forecasting & Budgeting
Senior Financial Analyst
Sr. Finance Manager
Vice President for Business & Finance
Vice President of Finance & Treasury
Vice President, Corporate Planning & Allocation
VP, Business Finance Operations
VP, Finance
And others!
HOTEL & VENUE

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(619) 231-4040

We currently have a discounted room rate for our attendees. There is a limited amount of rooms at the discounted rate so reserve today in order to secure your rate.

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Click here to make a room reservation.

$209/night – Limited amount of discounted rooms available.

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Recommended Field of Study: General
Program Level: Basic
Delivery Method: Group-Live
Prerequisites: None
Advanced Prep: None
Summit Registration Attendee Participation Rates
Early registration and group discounts below (available until September 15th):

1 Person - $1,299 total (a $500 discount)
2 People - $2,250 total (a $1,348 discount)
3 People - $2,997 total (a $2,400 discount)
4 People - $3,596 total (a $3,600 discount)
5+ People - Email registration@jpkgroupsummits.com

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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 JPK Group programs. Any cancellations made within four weeks of the programs start date will be provided with credit toward current or future JPK Group programs.