

# DATA-DRIVEN FINANCE & ACCOUNTING WORKSHOP

EXPLORE DIGITAL TRANSFORMATION &  
DRIVE CHANGE AS A KEY PARTNER FOR  
BUSINESS GROWTH

19 - 20  
MARCH 2020  
CLIFTONS SYDNEY

## EXPLORE

- ▶ Discover how data is driving finance and accounting
- ▶ Establishing the structure of a modern finance team
- ▶ Measuring and tracking value creation
- ▶ Planning, forecasting, and budgeting with data
- ▶ Modelling vs analytics
- ▶ Automation(RPA), AI, Machine Learning, Blockchain
- ▶ Core vs edge technology
- ▶ How to achieve efficiencies in modelling with automation
- ▶ Visual influencing and BI
- ▶ Finance leadership for the digital age

## EXPERT FACILITATOR



**Lance Rubin**  
Founder &  
Chief Executive Officer  
**Model Citizn**

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## ABOUT THE EVENT

Data is the new oil. But do you and your finance team know how to get the most out of your data?

From an organisational perspective, finance is the foundation of value creation, foresight and insight, transforming information into business intelligence. A future-ready finance professional must turn their hand to everything from budgeting and forecasting, to financial modelling and advanced data analytics.

As finance moves into the realm of business partnering, the ability to look into the future and anticipate outcomes becomes crucial - data can unlock the enormous potential of your business.

Learn to create robust predictive models that support strategy and distinguish yourself as a future-focused professional. It is these critical areas that are unlocking powerful opportunities for organisations looking to gain the edge in an increasingly competitive commercial market.

## TRAINING DELIVERY AND PRE-COURSE QUESTIONNAIRE

This workshop will be delivered using a three tiered approach. The structure of each session is as follows:

1. Technical overview and review of research into the topic area under discussion
2. Practical application of management principles in the review of case studies, worked examples and interactive exercises
3. Discussion of outcomes and implementation issues

Workshop participants will have the opportunity to include comments and questions about issues outlined in the program by way of a pre-course questionnaire. This feedback will enable the course facilitator to adjust content accordingly. The workshop has limited places to allow for customisation, greater interactivity and for individual concerns to be addressed.

## DAY ONE

### FRAMEWORKS & MINDSET

#### Foundations of data-driven finance

- ▶ How data is driving finance and accounting in the digital age
- ▶ Establishing the structure of modern finance team
- ▶ The three pillars of the tech stack
- ▶ Innovation and process improvements

#### Centres of excellence and collaboration

- ▶ Skills required for finance evolution
- ▶ Growth mindset vs fixed mindset
- ▶ Rise of the finance business partner
- ▶ Rise of the virtual CFO

#### KPIs and measuring the right stuff

- ▶ Measuring and tracking value creation
- ▶ Planning, forecasting and budgeting with data
- ▶ Financial modelling with industry awareness and a clear focus
- ▶ Resolving challenges accessing robust data from multiple sources and ensuring proper integration

#### Modelling vs analytics

- ▶ Similarities and differences between financial modelling and analytics
- ▶ Technology and tools driving both and how these differ
- ▶ Key foundations of both and how they align around data and logic
- ▶ How to make and validate assumptions for effectiveness

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## DAY TWO

### TECH, TOOLS & LEADERSHIP

#### Key tools of a data-driven finance team

- ▶ Automation(RPA), AI, Machine Learning, Blockchain
- ▶ Core vs Edge Technology
- ▶ Excel is dead! Really?
- ▶ Spreadsheet issues and how to solve them

#### How to achieve efficiencies in modelling by automation

- ▶ The cornerstones of a flexible model, managing variable uncertainty
- ▶ Incorporate sensitivity analysis to mitigate risk and increase accuracy
- ▶ Common pitfalls of complex financial models and tools to overcome them

#### Visual influencing and BI

- ▶ Discover data insights and stories
- ▶ Visual influencing trends and how it's changing the way decisions are being made and stories told
- ▶ A robust structure for approaching data analytics and modelling visualisation
- ▶ Tools and concepts for effective visualisations

#### Future of data-driven finance

- ▶ Leadership facing challenges for the digital age
- ▶ Assessing current team capability
- ▶ Adaptive leadership and embracing change In uncertainty
- ▶ Taking action - What does it really take?

### WORKSHOP SCHEDULE

- 8.30 - 9.00 Registration
- 9.00 - 10.40 Session One
- 10.40 - 11.00 Morning Tea
- 11.00 - 12.30 Session Two
- 12.30 - 1.30 Lunch
- 1.30 - 3.00 Session Three
- 3.00 - 3.20 Afternoon Tea
- 3.20 - 4.30 Session Four
- 4.30 Close of Workshop

## WHO WILL ATTEND?

- ▶ Financial Accountants
- ▶ Financial Analysts
- ▶ Financial Managers
- ▶ Financial Controllers
- ▶ Senior Accountants
- ▶ Accounting Managers
- ▶ Chief Information Officers
- ▶ Heads of Budgeting
- ▶ Finance Business Partners
- ▶ Chief Audit Executives
- ▶ Heads of Finance
- ▶ Group Financial Controllers
- ▶ Heads of Revenue Planning and Performance
- ▶ Group Finance Managers
- ▶ Directors of Finance
- ▶ Chief Risk Officers
- ▶ Treasurers

## YOUR FACILITATOR

Lance has a wealth of modelling experience across financial and professional services having worked at two of the Big 4 accounting, Investec Bank Corporate Finance & Advisory and National Australia Bank across both retail and wholesale banking divisions and products.

Lance started his own financial modelling consultancy firm following over 20 years' corporate experience, having moved most recently from the KPMG modelling team (and prior to that, NAB).



**Lance Rubin**  
Founder & Chief Executive Officer  
**Model Citiz**

# Data-Driven Finance & Accounting Workshop

19 - 20 March 2020

Cliftons Sydney

# Booking Form

Event Reference: DDFa0320A - S

Priority Code: I

## Registration Information

Organisation Name

Address Suburb State Postcode

Booking Contact Information

Title Full Name Position Email Phone

## Delegate Information

# Title Full Name or TBA Position Email

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## Your Investment

Options (per person)		Value Plus Rate	Super Saver Rate	Early Bird Rate	Standard Rate
Qty		Register and pay by 20 December	Register and pay by 23 January	Register and pay by 18 February	
___	Workshop	\$1995 + GST = (\$2194.50)	\$2495 + GST = (\$2744.50)	\$2795 + GST = (\$3074.50)	\$2995 + GST = (\$3294.50)
Discounted off standard rates :		<b>Save up to \$1000</b>	<b>Save up to \$500</b>	<b>Save up to \$200</b>	All Prices listed in Australian Dollars

<b>Group Discounts Available:</b>	<b>15% off Standard Rate</b> Team of 3 - 4	<b>20% off Standard Rate</b> Team of 5 - 7	<b>25% off Standard Rate</b> Team of 8+
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<b>TOTAL incl GST</b>	
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**Note:** Course materials, refreshments & lunches are included. Travel and accommodation are NOT included. Registration Options are per person only.

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CVV    Full Name as on card

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BSB: 032 002  
Account No: 407 273  
SWIFT Code: WPACAU2S

Amount

Please quote ref DDFa0320A - S and registrant name

## Authority

Authorising Manager's Details: This registration is invalid without a signature

Name Position Phone  
Email Signature Date

Email this form to: [registration@liquidlearning.com.au](mailto:registration@liquidlearning.com.au) or Call us on: +61 2 8239 9711

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