

# DATA-DRIVEN FINANCE & ACCOUNTING WORKSHOP

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

21 - 22  
SEPTEMBER  
ONLINE DELIVERY

## EXPLORE

- ▶ Discover how data is driving finance and accounting
- ▶ Establishing the structure of a modern finance team
- ▶ Automation(RPA), AI, Machine Learning, Blockchain
- ▶ Visual influencing & BI

## EXPERT FACILITATOR



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

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## ABOUT THE EVENT

They say data's 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 - FRAMEWORK & 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

Practical exercise - Effective presentation and influencing skills for better strategic decision making in a collaborative setting

### 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

- 9.30 - 10.00 Sign in
- 10.00 - 11.40 Session One
- 11.40 - 12.00 Morning Tea
- 12.00 - 1.30 Session Two
- 1.30 - 2.30 Lunch
- 2.30 - 3.00 Session Three
- 3.00 - 4.20 Afternoon Tea
- 4.20 - 5.30 Session Four
- 5.30 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 of Corporate experience having moving most recently from NAB where he was a senior leader across Performance Management and Rates Validation which was responsible for daily pricing, rates and valuation used in the bank's core banking systems across interest rate, foreign exchange and commodities.

Lance was previously members of both the Chartered Accountants Australia & New Zealand (CAANZ), Member of the South African Institute of Chartered Accountants (SAICA) (2000-2009), Financial Modeling Fundamentals (Modano certified A+), Certified trainer for the Financial Modeling Institute (FMI) focusing specifically on the Advanced Financial Modeler (AFM) accreditation.

Most recently Lance was selected to be a judge of the world's first Financial Modelling Innovation Awards and a speaker at the Financial Modelling Summit (to be held virtually)



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