

STRATEGIC FINANCE & MANAGEMENT ACCOUNTING WORKSHOP

FUTURE-PROOF YOUR FINANCE FUNCTION &
ENGAGE AS A VALUED BUSINESS PARTNER

CLIFTONS SYDNEY
17 - 19 SEPTEMBER

CLIFTONS BRISBANE
2 - 4 OCTOBER

THREE TARGETED, INTENSIVE DAYS:

Day One: Strategy, Planning, Forecasting & Modelling



Lance Rubin
Founder & Chief
Executive Officer
Model Citizn

Day Two: Data Analytics, Visualisation & Business Insights



Felipe Rego
Data Science &
Analytics Partner

Day Three: Valued Finance Business Partner - Communicating, Leading & Influencing



Kevin Riley
Managing Director
Capital Training College

CPD/CPE GUIDE

Clock up to 21 hours of
Structured learning!

Check with your local
professional association
or society for eligibility.

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\$1000

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9 JULY 2019
TO SAVE UP TO \$1000

START YOUR LEADERSHIP JOURNEY!

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ABOUT THE EVENT

FUTURE-PROOF YOUR FINANCE FUNCTION

The role of finance and accounting in organisations is changing more rapidly than ever. Where teams have been traditionally occupied with hindsight, reporting and compliance, the emphasis is increasingly shifting to a more strategic outlook, from transactional to transformational. From an organisational perspective, finance is the seat of value creation, foresight and insight, turning information into business intelligence.

These shifts have changed the core competencies necessary for a finance professional to distinguish themselves, and future-proof their roles in an evolving commercial landscape. A future-ready finance professional must turn their hand to everything from budgeting and forecasting, financial modelling, and advanced data analytics, to strategic decision-making, critical thinking and business leadership.

CORE COMPETENCIES FOR TOMORROW'S FINANCE LEADERSHIP

This three day intensive program has been designed and developed by some of the country's leading specialists, to drill down into the core competencies defining finance leadership for the future:

- Strategy, Planning, Forecasting & Modelling
- Advanced Data Analytics, Visualisation & Insights
- Commercial Partnering, Communication & Influence

It is these critical areas that are unlocking powerful opportunities for organisations looking to gain the edge in an increasingly competitive commercial market.

Refresh your tools and refine your skills, make sure this program an essential part of your annual development plan.

WHO WILL ATTEND?

Finance and Accounting Professionals in operational roles, in the following areas:

- Management Accounting
- Planning and Analysis
- Forecasting
- Strategic Planning
- Performance Management / Reporting
- Budgeting and Cost Management Specialists
- Business Analysts
- Finance Managers
- Chief Financial Officers
- Finance Directors
- Financial Controllers
- Corporate Services

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NOW**

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STRATEGY, PLANNING, BUDGETING & MODELLING

WORKSHOP - DAY ONE

The strategic role of the budget and planning in the current organisational context

- How does a budget vs forecast vs model compare? The main functional differences between modelling, planning, budgeting and forecasting
- Current pitfalls of the planning and forecasting processes
- How to get more value from the planning, forecasting process

Fine-tune traditional budgeting activities to support decision-making

- Activity Based, Zero-Based, Driver-Based, Growth-Based

Fine-tune traditional budgeting activities to support decision making

- How do you move from reactive to proactive?
- Moving towards more dynamic and adaptive forms of forecasting
- Using budgets and forecasts to inform and drive decision-making
- Finance cadence around budgeting activities (what is the best frequency?)

Connect business planning, budgeting, and forecasting

- How do you get value from a connected process?
- What does a connected process look like?
- What are the key ingredients and steps to take to get there?

Strategy linked forecasting and performance models

- How to link strategy to forecasting and budgeting
- The strategy of execution is key to success
- What gets measured gets done, making sure you measure the right KPIs
- How to track performance and how to influence or change the performance trends

Key principles of effective financial modelling

- Key skills required to be a great financial modeller
- What does a good model contain? How can you tell whether a model has been built well?
- Key disciplines and controls needed within a team

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 Citizen

ADVANCED DATA ANALYTICS, VISUALISATION & INSIGHTS

WORKSHOP - DAY TWO

Data science and machine learning history and fundamentals

- ▶ Explore the fundamentals and historical developments of data science and machine learning
- ▶ Showcase and explain in layman's terms the latest trends and hot topics in analytics
- ▶ Discuss and define a variety of concepts and use cases in data science and machine learning

Introduction to descriptive and predictive analytics in practice

- ▶ Explore and work through an exploratory data analysis (EDA) exercise
- ▶ Introduce and apply a machine learning model to a basic and simple dataset
- ▶ Utilise a popular business tool to interpret and summarise the results of a predictive model

Deciphering key components and best practices in data visualisation

- ▶ Understanding graph theory and colour theory
- ▶ How different shapes and objects are perceived and create meaning
- ▶ Practical interactive activities exploring use cases of data visualisation

Building narratives for successful data visualisation and storytelling

- ▶ Learn the power of narrative and how to effectively communicate with data
- ▶ Understand the power of visual storytelling
- ▶ Making the right graphical choices, and controlling the narrative

VALUED FINANCE BUSINESS PARTNER - COMMUNICATING, LEADING & INFLUENCING

WORKSHOP - DAY THREE

From bean counter to strategic business partner

- ▶ Transform your team into cross-functional, valued finance business partner
- ▶ Factors driving information needs and influencing behaviour
- ▶ Converting technical knowledge into strategic value

Translate management accounting into effective strategic management action plans

- ▶ Articulating complex ideas that achieve stakeholder expectations in a simple manner
- ▶ Assisting operational management to understand the financial ramifications of their service
- ▶ Identify savings targets, add value and develop savings or revenue plans

Making finance leadership work tactically, strategically and practically

- ▶ Leveraging the value chain
- ▶ Strategic analysis to provide insightful analysis and evaluation
- ▶ Enable successful transformation using enterprise risk management and more effective business models

Communicating with impact and influence

- ▶ Telling the story behind the numbers, gaining stakeholder buy-in
- ▶ Presenting to the board, getting the pitch right
- ▶ Building influential relationships at senior and executive levels

YOUR FACILITATOR

Felipe is a leading advanced analytics and data science partner, helping teams build, manage and enhance their data science and visualisation solutions in a strategically-aligned, commercially-oriented and customer-centric way.

With extensive industry experience as well as analytical expertise, Felipe is often required by marketing, sales, finance, technology and strategy teams to provide support and to deliver robust analytical solutions that are easy to use, understand and implement. Felipe's unique methodology focuses on a holistic organisational approach to using data and science to improve performance and reduce costs.



Felipe Rego
Data Science &
Analytics Partner

YOUR FACILITATOR

Kevin Riley has more than 30 years' experience in financial and performance management and budgeting. This includes working with Treasury and Finance departments in the Commonwealth and across all Territory and State jurisdictions. Kevin also has experience in the mining, manufacturing and food processing industries.



Kevin Riley
Managing Director
Capital Training College

2 - 4 October 2019 Cliftons Brisbane

Priority Code: I

Organisation Name

Address	Suburb	State	Postcode
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Booking Contact Information

Title	Full Name	Position	Email	Phone
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#	Title	Full Name or TBA	Position	Email	Attendance Date/s
1					<input type="checkbox"/> Sydney <input type="checkbox"/> Brisbane
2					<input type="checkbox"/> Sydney <input type="checkbox"/> Brisbane
3					<input type="checkbox"/> Sydney <input type="checkbox"/> Brisbane
4					<input type="checkbox"/> Sydney <input type="checkbox"/> Brisbane
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10					<input type="checkbox"/> Sydney <input type="checkbox"/> Brisbane

Options (per person)		Value Plus Rate	Super Saver Rate	Early Bird Rate	Standard Rate
Qty		Register and pay by 9 July	Register and pay by 2 August	Register and pay by 23 August	
_____	Workshop	\$2995 + GST = (\$3294.50)	\$3295 + GST = (\$3624.50)	\$3595 + GST = (\$3954.50)	\$3995 + GST = (\$4394.50)
Discounted off standard rates :		Save up to \$1000	Save up to \$700	Save up to \$400	All Prices listed in Australian Dollars

Group Discounts Available:	10% off Standard Rate Team of 3 - 4	15% off Standard Rate Team of 5 - 7	20% off Standard Rate Team of 8 - 9	25% off Standard Rate Team of 10+
TOTAL incl GST				

Conditions: Group Discounts apply for bookings made simultaneously. Only one discount applies. Group discounts apply to standard rates only. Group discounts are not applicable to Value Plus, Super Saver and Early Bird rates. Discounts cannot be applied retrospectively and must be claimed at the time of booking. Liquid Learning Group reserves the right to have sole discretion on an organisation's eligibility for discounts.

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