

Finance Transformation

Increasing the strategic focus of finance to deliver long-term value to stakeholders

International & keynote speakers include:



Bill Cowie
Director, Business Operations Support
Tetra Pak International Switzerland



Michael Fahey
Chief Financial Officer
Arnott's Biscuits Limited



Tim Rothwell
Chief Financial Officer
Brisbane Airport Corporation



Peter Barker
Chief Financial Officer
Asia Pacific
Cisco Systems

"To compete as a Finance function of the future – you cannot afford to miss this event!"

Dr Martin Fahy
Director Development (Asia Pacific)

Learn how to:

- Restructure your finance function around business priorities
- Reduce your expenses through process consolidation, standardisation and automation
- Translate business intelligence to understand business data, its financial implications and forecast change
- Develop financial leadership capabilities that understand the drivers of the business and the new role of Finance



Best practice insights from:

Michael McCarthy
Acting Chief Financial Officer
**Ministry Of Health
New Zealand**

Peter Mullin
Head of Group
Performance Management
ANZ Banking Group

Steve Metrick
GM Finance Strategy
and Transformation
National Australia Bank

Dr Martin Fahy
Director Development
(Asia Pacific)
**Chartered Institute Of
Management Accountants**

Leon Isaacs
Project Manager
Business Improvement
AAPCS

Alister Cairns
Financial Systems Manager
Integral Energy

John Blair
Manager Corporate Finance
Gold Coast City Council

Paul Thambar
Chief Executive Officer
Serendib Business Solutions P/L

Paul Ormonde-James
Group Business
Intelligence Executive
MBF

Tony MacMahon
Finance Manager - Business
Analysis
Kimberly-Clark

Associate Professor Frank Ashe,
Financial Risk Management
Macquarie University

Researched &
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finance IQ
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Do you want to know the safest path to change and transformation?

Dear Executive,

Without a doubt, the days when Finance functions acted as number crunchers and record keepers are over. But, most organisations struggle to clearly re-define Finance's new role as a business partner adding strategic value. In order to arrive at a world class Finance function you need to transform your structure, re-engineer your processes, integrate your systems and empower your people!

IQPC in partnership with CIMA has crafted a unique conference that will outline what best practice Finance Transformation looks like and how you can get there. New insights from transformation projects and cross-industry benchmarking will help you to minimise risky changes to your roles and responsibilities, enabling you to manage the change and deliver value to your stakeholders. Attend **Finance Transformation** and you will leave with a clear picture of the necessary strategy, tools and methodologies to meet your new role of Finance as a business partner.

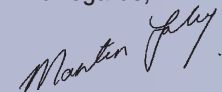
Highlights include:

- **ANZ Banking Group** outlining a planning framework that assists business decision making for strategy, budgets and investment resource allocation
- Global best practice showcased by **Tetra Pak International Switzerland** on process orientation, benchmarking and metrics to drive and control world class finance performance
- **MBF** and **Integral Energy** sharing how you can use Business Intelligence to increase the analytical focus of finance and improve both planning and forecasting
- A half day summit with **Cisco Systems Asia Pacific, Kimberly-Clark, Cadbury Schweppes** and **AC Nielsen** on creating financial leadership capabilities to give you the people skills you need today for your financial set up of tomorrow presented by **CIMA**

This conference is guaranteed to leave nothing out. **Don't let your Finance function be left behind and start acting as a true decision support function.** Phone our registration hotline on (02) 9223 2600 now and secure your place at a discounted rate today!

We look forward to welcoming you at the conference!

Kind regards,



Dr Martin Fahy,
Conference Chair



Alice Kuepper,
Conference Director

P.s. Learn how you can develop a practical framework to increase the strategic focus of finance as well as implement system improvements to streamline transactions in the executive tutorials

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Who You Will Meet And Benchmark Against

This conference has been developed for Chief Financial Officers, Directors, Heads, Controllers, General Managers and Managers of: Finance, Budgets, Accounting, Performance, Corporate and Shared Services, Process and Continuous Improvement and Transformation

Day One / Tuesday, 29 August 2006

8.30 Registration and Coffee

9.00 Opening Remarks From The Chair

Dr Martin Fahy, Director Development (Asia Pacific)

CHARTERED INSTITUTE OF MANAGEMENT ACCOUNTANTS

Understanding The Context Of A Strategic Focus Of Finance

9.10 Aligning Finance With Corporate Objectives To Increase It's Strategic Focus



Identify the key drivers creating a need to transform Finance and how Finance can contribute towards the achievement of strategic corporate objectives.

- Identifying market factors driving change within Finance to understand the need for increased strategic focus
- Exploring the implications of Finance's lack of corporate viewpoint and purely internal focus to understand the relevance of a broader, more strategic role for Finance
- Understanding the benefits of aligning Finance with strategy to maximise the value-adding capabilities of Finance

Dr Martin Fahy, Director Development (Asia Pacific)

CHARTERED INSTITUTE OF MANAGEMENT ACCOUNTANTS

9.50 Finance Transformation - Process Orientation Supporting Sustainable Competitive Advantage



- Linking Finance and control activities to business strategy
- Process, benchmarking and metrics as a method of driving Finance and control to world class performance
- Finance and control as an enabler and integrator
- Importance of governance structures – transformation office

Bill Cowie, Director, Business Operations Support

TETRA PAK INTERNATIONAL SWITZERLAND

10.40 Morning Tea And Time To Network

11.00 Discussing Different Methodologies To Drive Finance Performance And Transformation



- Business Process Outsourcing and offshoring
- Leveraging technology, business intelligence and analytics for transformation
- Reengineering through Six Sigma
- Benchmarking aspects of different methodologies

Steve Mettrick, GM Finance Strategy and Transformation

NATIONAL AUSTRALIA BANK

Bill Cowie, Director, Business Operations Support

TETRA PAK INTERNATIONAL SWITZERLAND

Michael Fahey, Chief Financial Officer

ARNOTT'S BISCUITS LIMITED

11.40 Benchmarking Information To Arrive At A World-Class Finance Function

Hear from an industry leader to identify and benchmark what best practice Finance transformation looks like.

- Benchmarking structures to determine resources allocated to shared services and business units
 - Leading process improvements of budgeting, month end and analysis
 - Using the right systems to maximise the value of your data
 - Ensuring effective implementation by developing your people
- Reserved for special IQPC conference partner

12.20 Lunch With The Leaders

Aligning Finance With The Corporate Strategy

1.30 Becoming A Strategic Business Partner To Other Business Units To Add Value



Explore how Finance can add value by expanding its traditional function and becoming a consultative business partner to the

remainder of the business.

- Discussing Finance as a historical recordkeeping and control function
- Outlining Finance in its modern role and strategic focus customer focus/business partner
- Process and Technology focus
- Enterprise Performance Management (EPM) new concept in term of how you manage the organisation
- Reporting and analysis
- Governance and risk management

Paul Thambar, Chief Executive Officer

SERENDIB BUSINESS SOLUTIONS P/L

2.10 Becoming A Business Partner To Other Business Units To Add Value



- Making the move from traditional scorekeeper to the business partner of choice
- Aligning Finance with the vision and mission of the company
- How finance can add value
- The key attributes for a finance professional in business

Michael Fahey, Chief Financial Officer

ARNOTT'S BISCUITS LIMITED

2.50 Aligning Finance With Business-Wide Strategic Plans



Hear a practical case study of how the Gold Coast City Council has transformed their Finance function by incorporating the objectives of other departments with Finance plans. The diversity of the Council's services and growth issues experienced make this case study relevant to a broad range of organisations.

- Developing Finance plans in accordance with firm-wide strategic and business plans
- Bringing together multiple departments to remove individual departmental focuses that are counter-productive to strategic goal alignment
- Successful implementation of the consolidated strategic plans to ensure effective transformation of Finance

John Blair, Manager Corporate Finance

GOLD COAST CITY COUNCIL

3.30 Afternoon Tea And Time To Network

Managing Stakeholder Information Needs But Transforming From A Reporting Function To A Performance Function

3.50 Building a Planning Framework for Business Strategy, Annual Budgeting And Investment Resource Allocation



Hear how ANZ has constructed a planning framework that assists the organisation's decision making and builds a logical connection between activities that are often fragmented. In doing so, ANZ has made significant steps forward in:

- Improving strategic planning
- Making accurate investment resource funding decisions
- Meeting annual financial targets

Peter Mullin, Head of Group Performance Management

ANZ BANKING GROUP

4.30 Business Plan Processing - Bringing The Whole Organisation Together



- The importance of a fully inclusive business plan process
- Alignment of corporate and individual goals
- Linking activities to growth in shareholder value
- The importance of long term planning in a modern airport business

Tim Rothwell, Chief Financial Officer

BRISBANE AIRPORT CORPORATION

5.10 Closing Remarks From The Chair

5.20 Close Of Day One

Day Two / Wednesday, 30 August 2006

9.00 Opening Remarks From the Chair

Dr Martin Fahy, Director Development (Asia Pacific)

CHARTERED INSTITUTE OF MANAGEMENT ACCOUNTANTS

Leveraging Technology And Implementing System Improvements To Streamline Financial Transactions

9.10 Improving The Responsiveness Of Your Organisation By Using Business Intelligence

The best fit for Business Intelligence is within Finance where BI tools can alert the CFO of strategic issues and assist him in his planning and forecasting. Hear how MBF is implementing a BI portal and learn about:

- The importance of data integrity in making informed decisions
- Rolling out management scorecarding system, reporting by exception and deploying a group KPI system
- Managing cultural changes when using time and data more effectively to forecast change

Paul Ormonde-James, Group Business Intelligence Executive

MBF

9.50 Leveraging Business Analytics To Streamline Finance and Add Value



Explore BI in the context of Finance and how you can use it to streamline Finance processes and add value to the Finance function.

- How BI, data warehousing and enterprise resource systems can be applied to Finance transformation
- Increasing the analytical focus of Finance and adding value

Alister Cairns, Financial Systems Manager

INTEGRAL ENERGY

10.30 Automating Expenditure Management To Remove Inefficiencies And Streamline Finance

Finance functions can only add value if all its non-value adding processes are eliminated and the reactive cash management is outsourced or automated. Hear how AAPCS has completely eliminated its transactional data entry and freed up resources that can now concentrate on Finance's analytical focus:

- Identifying key reporting process areas requiring change to free up resources
- Implementing a procurement card and staff and travel expenditure solution
- Negotiating the best suppliers for your solutions
- Replacing the transactional activities with an analytical focus of Finance

Leon Isaacs, Project Manager, Business Improvement

AAPCS

11.10 Morning Tea And Time To Network

Managing Risks To Drive Continuous Improvement

11.30 The Importance Of Risk Management And Governance Frameworks



- The strategic focus of Finance - what to look out for from a risk management perspective
- Exploring the problems of performance measurement
- Information - when do we turn it back into data?

Associate Professor Frank Ashe, Financial Risk Management

MACQUARIE UNIVERSITY

Frank Ashe has been an Associate Professor at the Macquarie University Applied Finance Centre since January 2002, with research interests in governance and risk, financial risk management, robustness of investment portfolio construction techniques, market risk management, and the statistical underpinnings of Applied Finance. His 20 years of practical experience has been predominantly in the management and measurement of financial risk with insurance companies, investment management firms, and in software development and consultancy.

12.10 Identifying And Managing Pressures Through Strategic Risk Management

International



To increase the strategic role of Finance organisational and financial risks need to be clearly identified, managed and controlled carefully, and they must be understood by the stakeholders. In this session Mike will outline how you can control of risks through management processes, strategies and rating systems:

- Outlining different risk assessments levels and relative weighting against other risks to come up with the top risk
- Exemplifying physical risk assessment to identifying the dollar value of a risk and its mitigation factor
- Conducting environment scans to identify all pressures across the sector

Michael McCarthy, Acting Chief Financial Officer

MINISTRY OF HEALTH NEW ZEALAND

12.50 Lunch With The Leaders

Afternoon Summit

Proudly presented by CIMA

Creating Financial Leadership Capability To Facilitate Sustainable Transformation



2.00 Introductory Perspective

Dr Martin Fahy, Director Development (ASIA PACIFIC)

CHARTERED INSTITUTE OF MANAGEMENT ACCOUNTANTS

2.10 The Challenges Of Finance Leadership Development

- From skills to value, beliefs and identity
- How do we really change behaviour?

Peter Barker, Chief Financial Officer Asia Pacific

CISCO SYSTEMS



International



2.50 Achieving Development Through Team Success Profile

Through a scaling profile Kimberly-Clark defines what success means for the role within Finance and the organisation. By embracing this process it can achieve outstanding results and promote the ownership of self development amongst the teams. Tony will address:

- Defining success within different roles in terms of technical expertise, personal skills, competencies and experiences
- Gauging where the individuals fits within the success scale and identifying skill and success gaps
- Writing and implementing the development plan for each team

Tony MacMahon, Finance Manager - Business Analysis

KIMBERLY-CLARK



3.30 Afternoon Tea And Time To Network

3.50 Facilitated Panel Discussion: Building Your Finance Teams Influencing, Consulting Skills And Change Leadership Capability



Peter Barker, Chief Financial Officer Asia Pacific

CISCO SYSTEMS

Justin Scanlon, Financial Controller (subject to availability)

CADBURY SCHWEPPE'S

Richard Williams, Associate Financial Director

AC NIELSEN

4.50 Wrap Up And Action-Plan Development

5.00 Closing Remarks From The Chair

5.10 Close Of Conference

Don't Forget...



Executive Tutorial A / 9.00AM – 12.30PM

How To Develop A Practical Framework To Increase The Strategic Focus Of Finance

Various facets of the Finance function need to change in order to transform the role of Finance into a value adding function of the business. In this very practical and interactive workshop participants will explore practical guidelines and develop a strategic framework to transform Finance into a value-adding business partner. **In particular you will explore:**

- Increasing Finance's role as a partner in business strategy development
- Improving Finance organisation by ensuring the right structure and infrastructure
- Getting the right staff skills and culture
- Process design and improvement of Finance
- Updating Finance operations and ERP systems
- Improving knowledge management and DW systems
- The role of Analytics and Business Intelligence
- Finance in support of brand and marketing effectiveness
- Selling Finance as a strategic business partner

About Your Executive Tutors:

Dr. Martin Fahy is the incoming Director Development **CIMA** Asia Pacific. He is a fellow of the Institute of Chartered Accountants in Ireland and holds a Ph.D in Business Information Systems from University College Cork, Ireland. Prior to joining CIMA Martin was an Academic at National University of Ireland, Galway NUI, Galway. He is a recognised thought leader in the areas of Shared Service/BPO and Finance Transformation. Organisations that he has worked with in his research include Michelin, Unilever, Oracle, HSBC, Bank of Ireland, and Diageo.



Paul Thambar is Chief Executive Officer, **SERENDIB BUSINESS SOLUTIONS P/L**, a performance improvement consultancy. Serendib provides services in the areas of strategy, finance transformations and people leadership development to private and public sector organisations. Paul has worked on performance improvement initiatives in the Financial Services and Healthcare sectors. He has presented papers at public conferences in the area of performance improvement. Paul is a member of CIMA – UK and serves on the NSW Branch committee with responsibility for professional development events.



Executive Tutorial B / 1.30PM – 5.00PM

Strategic Re-alignment of Procurement And Supplier Settlements

Finance should be about business improvement. Its core role is the analytical tool that identifies the bottom line impact of business activity through effective and efficient management reporting. The aim of this strategic refocus of the procurement function is to provide appropriate tools and processes to support a holistic approach to procurement decentralisation, eliminate the need for a data processing sweatshop within the finance function and the re-alignment of finance to create a functional analytics tool that supports as its primary focus the core business function.

This workshop will explore tools available to the forward thinking executive to achieve resource re-allocation within the finance function and eliminate redundant practices. As a result you will be able to change in the way the business views procurement and re-align the procurement function by:

- Placing responsibility at the coal face of business activity
- Cascading ownership
- Fully de-centralising procurement
- Using appropriate management tools
- Developing business efficient processes with financial banking partners
- Developing mutually beneficial agreements with core suppliers

About Your Executive Tutor:

Leon Isaacs is currently project managing a business improvement project at **AAP** Communication Services. Formerly a Qantas Executive Manager, Group Expenditure, Leon has actively promoted and delivered process improvements in the areas of accounts payable and banking and high volume transaction processing areas. A major project success was the Global Banking process implemented at Qantas (a first for the Asia Pacific).

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About CIMA

CIMA - The Chartered Institute of Management Accountants - is a leading membership body that offers an internationally recognised professional qualification in management accountancy, which focuses on accounting for business. CIMA is working with organisations throughout Asia Pacific to support their finance leadership programmes.

CIMA works in partnership with thousands of forward thinking organisations worldwide, supporting them and their CIMA students in their studies and professional development.

CIMA is the voice of over 87,000 students and 68,000 members in 155 countries. If you would like to find out how your organisation can benefit from CIMA training and support, please email angie.corkhill@cimaglobal.com

To speed registration, please provide the priority code located on the mailing label or in the box below.

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- (\$) Ask about multi-event discounts. Ring (02) 9223 2700 for more details
Please note: Only one discount applies

Accommodation And Airfare

The Lido Group is the official booking agent for accommodation and travel for the *Finance Transformation* conference. The Lido Group has negotiated discounted hotel rates at a range of hotels for all attendees of this event. To take advantage of these great rates contact:

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