

Winning Finance Teams

at Miramar Golf Club, Wellington: 28 March

Implementing and applying better practices

Now CFOs, controllers and corporate accountants can learn how to adopt winning finance team better practices – and become more effective, creating a positive footprint in every organization they are part of. Why spend months on an annual planning process you know is flawed? Why spend precious time on an annual report recasting numbers that were available the first week of the new year? Why spend a week or two on the monthly finance report that may not be read? Author and performance management leader David Parmenter has collected practices from more than 4,000 corporate accountants, all sectors from around the world. He has written an A-to-Z guide on what makes a 'winning finance team'.

This course, which is run only a couple of times each year is a unique opportunity to access the better practices that David has unearthed. His book, "Winning CFOs" which will be the back bone to this course is filled with templates, questionnaires, workshop agendas, draft memos and checklists to get the implementation started and take your Finance team on the journey from good to great.

Who will benefit

This course, a companion to "The CFO as a Leader and Business partner" is more focused on process improvement than leadership. This will suit all corporate accountants reporting through to the CFO and CFOs who wants to get into the nuts and bolts of best practice.

What you'll gain

- A copy of my "Winning CFOs – Implementing and applying better practices"
- An understanding of the leading practices that you can implement immediately
- Access to many electronic templates that will save hours of time
- A chance to share progress and discuss issues with fellow participants during the workshop exercises
- 8 CPE hours

Led by author, presenter and facilitator

David Parmenter
B.Com, FCA (ICAEW)

- Author of six books on performance management all published by John Wiley & Sons
- Over 20 years of consulting experience with a variety of organisations around the world
- Has delivered workshops in over 20 countries
- Has worked for BP Oil, Ernst and Young and Arthur Andersen & Co



Testimonials

"Very useful, re-enforced some thoughts. especially relevant with our planned introduction of a planning tool."

David O'Reilly, Financial Controller, Ballance Agri-Nutrients Ltd

"Thanks again for conducting "The CFO into a Leader and Business Partner". The course was a very valuable exercise. In particular, I enjoyed mixing in a smallish group with others who have similar issues. The informal nature of the course enabled one to pick up lots of ideas. All of your anecdotes added to the entertainment. Loved the Miramar Golf Club venue; easy to get to and very friendly atmosphere."

Bruce Lawrence, Finance Manager, Liquigas Ltd.

"Lots of useful stuff. Already making some changes, Very useful for practitioners as we are often the CFO for our clients."

Anne Stephenson, Partner, Stephenson Thorner Limited

"The quarterly rolling forecasting course was the most practical session I have ever attended. It has given me an insight not just about forecasting but also re constantly questioning what I'm currently doing and re-engineering a number of processes I currently undertake."

Greg Forck, Budget Director, Department for Victorian Communities

"Thank you for an excellent presentation. All of the teams gained some invaluable insight (including our economists) to the various topics. The troops are primed, share the vision and we are planning our changes. An outstanding success."

John Knox, Chief Finance Officer, ActewAGL, Canberra

"From the information gathered yesterday both my CEO and myself are keen to present a more viable and informative way of reporting to the Board and Managers throughout the Company that will allow us all to become better leaders and managers."

Phil Igoe, Chief Financial Officer, Wallara

"We attended your fast month-end workshop on 21 Feb and have implemented it immediately. We delivered the February month end reports by mid-day on day two!! We normally delivered the month-end by day 10 to 12."

Colin Barnes, Chief Financial Officer, GS1 Australia

The general consensus was that this was one of the most worthwhile professional development seminars that any of us had attended in quite a while. Your passion for all of the subjects covered came across throughout the day, and was backed up by the substance of your subject matter expertise and practical experience. The friendly, interactive nature of the seminar was a big plus.

John Poppe, ex- planning and analysis manager, New Zealand Steel Ltd

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In-House Training

This course can be presented exclusively for your organisation on an in-house basis tailored to meet your specific needs at a place and time of your convenience. David has successfully conducted in-house training for:

- Peoples Association of Singapore
- Tasco (wood processor), Geelong
- Hong Kong Institute of Certified Public Accountants
- NCB Capital (banking), Saudi
- Dashboard Insight (software developer), Toronto
- Inland Revenue, Fiji
- Open University, UK
- Development Bank, Fiji
- European Space Agency, Rome
- ActewAGL, Canberra
- Australian Post, Western Australia
- Ricoh, NZ
- Pars Khodro (car manufacturer), Iran
- Bank Islam, Brunei
- Lloyds of London (insurance)
- Cropcare, Brisbane
- Queensland Rail

Course White Papers can be purchased from www.davidparmenter.com

Course Format

This course will be held in a highly interactive workshop format with case studies, better practice examples and implementation guidelines.

Certificate of Attendance

Upon completion of this course you will receive a signed Certificate of Attendance.

Course Material

- All delegates will receive a slide handout for notetaking
- A copy of "Winning CFOs"
- Electronic templates from the book

Programme Schedule

08.30	Registration
08.45	Morning session begins
10.40-11.00	Refreshments & networking
12.45	Lunch
13.15	Afternoon session begins
14.40-15.00	Refreshments & networking
16.45	Finish of day with opportunity for further networking on the putting green

Presenter

David Parmenter is an international presenter who is known for his thought provoking and lively sessions, which have led to substantial change in many organisations. David is a leading expert in: the development of winning KPIs, replacing the annual planning process with quarterly rolling planning, quick month-end processes and making reporting a decision based tool.

His work on KPIs has received international recognition through: an award from the International Federation of Accountants, the popularity of his webcasts on various sites, and the success of his KPI book.

He has speaking engagements as far afield as Auckland, Wellington, Sydney, Melbourne, Brisbane, Adelaide, Canberra, Perth, Darwin, Darussalam, Kuala Lumpur, Singapore, Johannesburg, Jeddah, Tehran, Prague, Rome, Dublin, London, Birmingham, Manchester and Edinburgh.

John Wiley & Sons Inc have recently published two books titled "Winning CFOs: Implementing and Applying Better Practices" and "The leading-edge Manager's guide to success – strategies and better practices". His "Key Performance Indicators – developing, implementing and using winning KPIs" is now in its second edition and is a best seller.

David has an in-depth understanding of better practices of corporate accountants across all sectors. David has also worked for Ernst & Young, BP Oil Ltd, Arthur Andersen, and Price Waterhouse. David is a fellow of the Institute of Chartered Accountants in England and Wales.

He has written over 50 articles for the accounting and management journals. He has won two 'article of merit' awards from the International Federation of Accountants. (2007 and 2009). His published articles titles include: "Quarterly rolling planning – removing the barriers to success", "Throw away the annual budget", "Beware corporate mergers", "Implementing a Balanced Scorecard in 16 weeks not 16 months", "Convert your monthly reporting to a management tool", "Smash through the performance barrier", "Is your board reporting process out of control?" "Implementing winning Key Performance Indicators", "Quick month end reporting", "conquest leadership – lessons from Sir Ernest Shackleton" etc.



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Case Studies on:



Learning highlights of the one day workshop include:

- **A new performance management model** (The five foundation stones of performance management, the lessons from Peter Drucker, Jack Welch, Tom Peters, Gary Hamel and Jim Collins, importance of Drucker's abandonment, bullet proof recruiting, Kiazen – making innovation a daily activity)
- **Mastering the soft skills** (How to minimize your own personal baggage, How to sell change to the CEO, SMT and the Board, How to have a happy and productive Finance team, working smarter not harder)
- **Making the finance team efficient** (Fast monthly reporting – within 3 working days or less, revitalizing reporting into a decision based tool, two week annual plans, swift closure of the annual reporting – signed audited opinion within 3 weeks of year-end, 21st century accounts payable practices, etc)
- **Implementing quarterly rolling forecasting** (why annual planning can never work, why spreadsheets should not be used for forecasting and planning, the foundation stones of QRF, the better practices to adopt, the common pitfalls of forecasting)
- **The CFO reporting performance** (Daily and weekly reporting that will make a difference, Turning reports into a decision based tool, Working with winning KPIs, Reporting to the Board (including a one page dashboard)
- **The accountant as a leader** (Lessons from great leaders, A new model "winning leadership" that over a 13 week period will bear fruit, Creating winning personal and work habits)

Venue Information

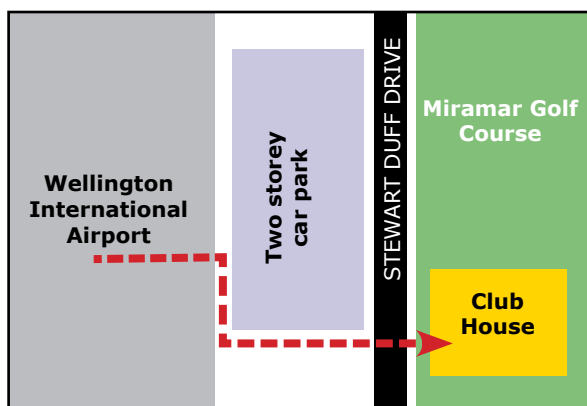
I have run five days of workshops at Miramar Golf Club by Wellington airport. The lunches are memorable and those not time pressured at the end of the day can enjoy a putting competition with a drink. Accommodation at the local airport motel is excellent for those who can get a cheaper late evening flight.

We will aim to start around 8.45am and finish at 4.45pm enabling those flying home to get back at a reasonable time.

Course Booking

The price is (excl GST) \$800 for one person, \$1,400 for two, \$1,800 for three. *If you get some of your peers from other organisations to come I will share the discount between you. Just put the details all on one form.*

Name(s) & Titles of those attending	Session	Price	Sub total
	28 March		
	28 March		
	28 March		\$
		GST at 15%	\$
		Total	\$



Booking required by **5pm 16 March** (deadline for venue confirmation).

Email to parmenter@waymark.co.nz

Payment required by direct credit **before 21 March**.

The invoice will be faxed and will include direct credit details.

www.davidparmenter.com

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