

DATA-DRIVEN FINANCE & ACCOUNTING WORKSHOP

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

MELBOURNE
19 - 20 MAY

CANBERRA
26 - 27 MAY

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).



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Founder & Chief Executive Officer
Model Citiz

Data-Driven Finance & Accounting Workshop

19 - 20 May 2020 Cliftons Melbourne

26 - 27 May 2020 Cliftons Canberra

Booking Form

Event Reference: DDFA0520A

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	Attendance Date/s
1					<input type="checkbox"/> Melbourne <input type="checkbox"/> Canberra
2					<input type="checkbox"/> Melbourne <input type="checkbox"/> Canberra
3					<input type="checkbox"/> Melbourne <input type="checkbox"/> Canberra
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Your Investment

Options (per person)

Qty

	Value Plus Rate Register and pay by 13 March	Super Saver Rate Register and pay by 3 April	Early Bird Rate Register and pay by 24 April	Standard Rate
Workshop	\$1995 + GST = (\$2194.50)	\$2495 + GST = (\$2744.50)	\$2795 + GST = (\$3074.50)	\$2995 + GST = (\$3294.50)

Discounted off standard rates :

Save up to \$1000

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Save up to \$200

All Prices listed in Australian Dollars

Group Discounts Available:	15% off Standard Rate Team of 3 - 4	20% off Standard Rate Team of 5 - 7	25% off Standard Rate Team of 8+
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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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Payment is required prior to attending this event

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