

All attendees will receive an electronic version of all the templates, checklists, draft memos, PowerPoint selling presentations used in the masterclass.

# The Financial Controller and CFO's Toolkit

**Elevate your finance team leadership with this two-day masterclass. Delivered by multi book author and international presenter, David Parmenter. who will expose you to over 100 lean practices. With a focus on developing business partnerships and increasing your ability to attract and retain talented finance staff rather than just processing information**

This masterclass will discuss how finance teams can help their organisations get future ready. The finance team's performance will be elevated by increasing efficiencies and becoming light on its feet. Developing world best practices and utilizing leading-edge technologies combine to result in "a future-ready" finance team. Embracing innovation, modern people practices while abandoning the broken, ill-conceived management practices of the past will ensure a successful transition.

Led by author, presenter & facilitator

**David Parmenter FCA (England & Wales)** 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 21st century LEAN practices that help get the finance team future ready. He is also known for his ground-breaking KPI methodology. He has presented in 31 countries and published four books including *Winning CFOs*, *The Financial Controller and CFO's Toolkit* and *Key Performance Indicators*. David has worked for EY, BP Oil and PwC, among others.

Locations for this two-day workshop

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Testimonials on course content

*One of our team members attended your lean finance team processes workshop in Sydney and from that we have:*

- *Reduced our monthly management report to a one-page management report which has been based on the A3 report template from the course (was approximately 30 pages)*
- *Shortened our month end process – we now complete it by working day 5*
- *Run daily scrums from working day -1 to working day 5 (stand up meetings lasting only 5 minutes (max) for those still involved in the month-end process)*

*These changes have:*

- *Given us a more focused approach to month end preparation*
- *Allowed us to tailor our management report to the users (not the finance team)*
- *Stressed the importance of timeliness vs accuracy which has encouraged our finance team to make better decisions*
- *Improved decision making, particularly if corrective action is required, as there is more time to make changes before next month is finished*
- *Freed up time to focus on looking forward rather than back*

Kelly Simpson, Australian Financial Controller, Harcourts

*We asked David Parmenter to run his one day in-house re-engineering of month end reporting course. Subsequently we moved the November month-end from a 7 working day close to 2 working days. This change has been a direct result from David's session. Our team embraced the re-engineering and abandoning processes that were no longer purposeful. We adopted the day one flash report, the daily scrums and noticed much more cohesive teamwork. There is now a much better awareness of what is important and on materiality. I would recommend this workshop to finance teams.*

Mark Ford | Finance Manager, Greater Wellington Regional Council

*"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 highlights for us were having a dynamic and engaging speaker, a speaker who had an in-depth understanding of the challenges and solutions for Finance functions and how the content/delivery during the day was customized to maximise the benefit to the attendees.*

Lisa Blundell, CFO, Birch & Waite Foods Pty Ltd

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## **Course outline of the two-day masterclass:**

### **Change: Why the need and how to lead**

- Getting your finance team future ready.
- Learn how to sell and lead change effectively from the masters.
- The importance of Peter Drucker's abandonment.

- Effective innovation.

### **The change you need to do immediately before next month-end**

- Lean better practices to help you **complete the next month end** within three working days.
- Lean and smarter work methods (“post-it” re-engineering, Kanban and scrums, action meetings etc).
- Quality assurance processes to give you quality error free reporting.

### **The seven technologies to adopt**

- Technologies to adopt (accounts payable, forecasting, consolidation, report, disclosure management, drill down applications, board reporting).

### **The change you need to do over the remaining six months**

- Reduce accounts payable volumes by 60%.
- Month-end reporting refinements.
- Lean one-page reporting that will win you admiration (A3 CEO Finance report, budget holder report, Board dashboard, daily and weekly formats).
- Better practice graphics using Stephen Few’s rules.
- Annual accounts completed within three weeks
- Annual plan also completed in two weeks or less
- Board reporting in the 21<sup>st</sup> century

### **Mastering the soft skills**

- Attracting and recruiting talent
- The skills to master to improve your leadership
- Sorting out the personal baggage
- Growing and retaining talent
- Putting the finance team on the map
- Delivering killer presentations like Steve Jobs
- Ten simple changes to improve time management.
- Toyota’s management principles and why they apply to SMEs

### **Implementing further strategic improvements**

- Implement lean accounting (real numbers)
- Implementing quarterly rolling forecasting
- Identifying the organisation’s critical success factors
- Getting your KPIs to work
- Reporting your key performance indicators
- Designing performance bonus schemes that will work
- Avoiding a rotten takeover or merger
- Offering alternatives to costly reorganisations
- Understand the hidden costs of downsizing

### **Who will benefit?**

- Finance directors, CFOs, financial controllers
- Management and financial accountants
- Consultants
- Practitioners who act as a CFO for their SME clients.

### **What you'll gain**

Upon attending you will be able to:

- Understand what it means to be lean and world class
- Speed up the trifecta of lost opportunities (slow month-end , year-end reporting and never ending planning cycles)
- Make change successful implementations of quarterly rolling forecasting 4,4,5 accounting periods, and new technologies such as planning tools and paperless Board papers
- Sort out performance issues such as ineffective KPIs, poor reporting, costly mergers and reorganisations
- Apply modern soft skills to enhance your leadership, assist with a better hit rate with your recruiting and make your presentations more compelling
- Network with like-minded attendees who will become a support network on your management summitting

You will receive a copy of David's The Financial Controller and CFO's Tool Kit along with electronic templates.

### **Course Format**

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

### **Programme Schedule for Each Day**

08:15 Registration commences  
08.45 Morning session begins  
10:45 Break — refreshments & networking  
11:00 Morning session continues  
12:30 Lunch  
13:15 Afternoon session begins  
14:45 Break — refreshments & networking  
15:00 Afternoon session continues  
16:45 Day concludes  
7 CPD hours per day

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### **Investment**

A\$2,200 incl GST, Early bird rate for registrations before \_\_\_\_\_ A\$1,800 excl GST

**Group discounts** for 3 or more, contact Jennifer Gilchrist.

### **Replacements, Cancellation and Refund Requests**

- Send a substitute in your place for no charge.
- Cancellations must be in writing at least two weeks prior to the event to receive a refund less a 10% service charge per registrant.
- Unfortunately, no refunds can be made less than two weeks prior to the event.
- The course material will be sent to registrations upon final settlement.

davidparmenter.com for full details.

Register online or by email

Visit [www.davidparmenter.com/courses/](http://www.davidparmenter.com/courses/)

Or, email a scanned copy of the completed form to

Gilchrist@waymark.co.nz

Please state your payment preference (bank transfer or by credit card)

You will receive the invoice, payment instructions and registration details within five working days of registration.

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

Locations

Sydney (CBD) – \_\_\_\_\_

Wellington (Miramar Golf Club) \_\_\_\_\_

Design by

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