

Four half day masterclasses based on “The Financial Controllers and CFO’s Toolkit”

Location:

Sydney

20 & 21 May

Melbourne

23 & 24 May

Run in conjunction with ACCA and Professional Advantage
Award winning technology provider

Now CFOs, controllers and corporate accountants can create a positive footprint in every organisation they are part of by learning how to adopt effective finance team better practices.

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?

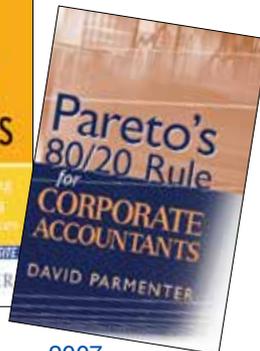
Author and performance management leader, David Parmenter, has collected practices from more than 4,000 corporate accountants from around the world covering all sectors. He has written an A-to-Z guide on what makes a ‘winning finance team’. The three editions of this work are:



2016



2011



2007

These four separate half day workshops are a unique opportunity to access the better practices that David has unearthed in writing his third edition.

Who am I?

I'm David Parmenter B.Com, FCA (ICAEW) and I'm known on the international speaking and consulting circuit as the "King of the KPIs".

I'm the author of eight business titles, all published through US based publishing house, John Wiley & Sons Inc. I've also written over one hundred articles for local and global accounting and management journals. In short, I'm a leading expert in 21st century LEAN practices that will help get the finance team future ready.

I've worked for some of the world's largest companies and consultancies including BP Oil, Ernst & Young, Arthur Andersen and PriceWaterhouse. I'm a Fellow of the Institute of Chartered Accountants in England and Wales.



What am I offering?

And why your finance team should send at least one, if not two attendees

- Attend 1, 2, 3 or 4 half day modules, send staff to different modules – your choice!
- Save hundreds of hours, every year, from your month-end reporting, annual accounts and annual budget process
- Find out how to implement modern lean methods such as quarterly rolling forecasting, planning tools and paperless board papers
- Unleash innovation in your organisation and the finance team
- Learn modern soft skills to enhance: your management; your recruiting success rate and your ability to sell and lead change
- Delivered by **multi book author and international presenter, David Parmenter**
- Receive over 50 electronic templates from this book (valued at \$150).

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and CFO’s Toolkit”**

FINANCE TEAM FOCUS DAY

Session 1: Day 1: 8.45am to 12:30pm **Month-end reporting by day three or less**

Although many large organisations have made massive inroads into fast and accurate month-end reporting, the vast majority of finance teams around the world have month-end processes that are career limiting, to say the least.

- Learn better practices to help you complete the next month end within three working days
- Streamline processes through “post-it” re engineering and Kanban boards
- Quality assurance processes to give you quality error free reporting
- Longer term month-end reporting refinements.

Session 2: Day 1: 13:15 to 16.45pm **Improving annual planning, forecasting and reporting**

Annual budgeting and planning can be completed in two weeks provided we take a fresh look at the process. The only thing certain about annual planning is that it is wrong as soon as the ink has dried, so we need to get it wrong quicker.

Many management reports are merely memorandums of information. They arrive too late and are error prone and too detailed.

- One-page reports (A3 CEO Finance report, budget holder report, Board dashboard, daily and weekly formats)
- Implementing quarterly rolling forecasting
- Redesigning planning so the annual plan is completed in two weeks or less, and the budgets are set on a rolling basis.

RELEVANT TO NON ACCOUNTANTS

Session 3: Day 2: 8.45am to 12:30pm **30 smarter ways for your team to work**

- Making work fun, winning work habits, changing meetings to either “Action Meetings” or scrums, saving hours a week out of your emails and delivering more compelling presentations.
- Time management techniques you may not have heard about (including Covey’s four quadrant planner, the 15 second rule for short term “to do” actions, Blue Sky Fridays for making the future happen, making more efficient decisions etc)
- Tips and strategies to improve your recruiting success rate
- How to use consultants wisely.

Session 4: Day 2: 13:15 to 16.45pm

Unleashing innovation in your organisation and the finance team

There are two types of innovation to unleash in your organisation.

Gemba Kaizen innovation which focuses on the continual improvement of internal processes.

Blue Ocean innovation which focuses on moving the organisation away from the bloody red oceans of competition to more rewarding opportunities.

- You will be taken through, step by step, how to introduce these important processes into your finance team and organisation
- Learn from what Drucker, Collins, Hamel and Peters have said about innovation
- You will learn about successful innovations your fellow peers have witnessed in current and past organisations.

Materials

Take away over 50 electronic templates from this book (valued at \$150) to kick start the change process.

Learning Outcomes

On successful completion of one or more of these workshops, you will be able to:

- Deliver more services with less resources and in less time
- Apply practices and techniques that will transform your finance team from good to great

Programme schedule for each day

08:30 Registration

08.45 Morning 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

7.0 CPD hours

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What attendees have said about David

The three modules I attended were relevant to what I do as a finance professional and the group of companies I work for. With the theory came real life examples which included options for solutions – such as naming the tier 1 and 2 forecasting tools and hearing from people using them. Receiving the template handouts electronically post course was most useful. The topics were covered in an easy to absorb way. The group discussions and shared experiences were a great part of the course.

Andrew Collis,

Group Financial Controller, Carrfields Limited

I thought your presentations were outstanding; the best I've seen of that ilk for a long time and I've seen a few. You have great ideas and wonderful presentation skills.

Chris Hannan

Principal Consultant Inside Info Pty Ltd

Thank you again for the delivery of a fantastic workshop. It would be fair to say it was one of the few courses I have been on that I really enjoyed. You will be pleased to hear that we have already started the process of reengineering our month end processes.

Glenn Boyes

Group Financial Controller, Argenta Manufacturing Ltd

Thank you for the informative course you presented today. On one hand, it has confirmed that my ideas already implemented or planned in the next few months are the right way to go ahead to improve my finance team. However, the one aspect I am most encouraged by is that I feel that you have also challenged my way of thinking on areas I hadn't thought of changing and I will certainly look to implement a number of your approaches/ideas. So, thank you again.

Gaby Andrews,

Finance Director, Allgood plc

This workshop was the most interesting and engaging accounting course I have done in a long while... possibly ever!

Jill Solomon,

Finance Manager, New Zealand Green Building Council

Early Bird Booking – SAVE \$100 per session

**Sydney 20 & 21 May &
Melbourne 23 & 24 May**

Early-bird registration fee (if received by **19 April 2019**) **\$400 plus GST** per session

If received after **19 April 2019** **\$500 plus GST** per session

How to register

Register online / by email / by phone

1. **Complete enquiry form at**
www.davidparmenter.com/enquiry/
2. **Email** Gilchrist@waymark.co.nz
with the names of attendees
3. **Phone Jennifer Gilchrist on +64 4 499 0007**

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

Cancellations

Cancellations up to four weeks prior to the workshop
(three options)

Bookings can be cancelled with a 10% administration surcharge up to 4 weeks before the course, all course papers sent as final settlement, another person can be sent as a substitute.

Cancellations within the last four weeks
(two options)

Another person can be sent as a substitute or all course papers sent as final settlement. In all cases fee is payable within the original stated dates in the brochure.

Venue Information

**Professional Advantage's
Training Room**

Level 16, 124 Walker Street
North Sydney

Phone: 1800 126 499

**Professional Advantage's
Training Room**

Level 10, 500 Collins Street
Melbourne

Phone: 1800 126 499



Tick payment preference

bank transfer

credit card

Name(s) & Titles of those attending	Session numbers	Sub total
Total		\$

These masterclasses are hosted by Professional Advantage

Helping Companies execute their Parmenter inspired strategies

Case Study: Birch & Waite, an Australian Quality Food Manufacturer, leverages BOARD and Professional Advantage to support rapid growth.

Following the Parmenter fast close and rolling forecast principles, and after attending a Parmenter Course, it was clear to Birch & Waite that reliance on spreadsheets and manually intensive processes were holding back improvement.

"The company never stands still when it comes to overcoming challenges. It's about staying on top of our game. We needed to make sure our forecast aligned with what we were planning to do, and that it correlated to our integrated business planning and sales and operational plans."

Lisa Hennig, CFO, Birch & Waite

Birch & Waite selected Professional Advantage to implement a corporate performance management solution that would deliver annual plans, rolling forecasts, on demand scenario planning and financial performance reporting, and supported sustainable growth and investment strategies.

To learn more read the case study www.pa.com.au/case-studies/birch-waite/

Professional Advantage is an IT consulting and solutions company. We are one of Australia's most awarded technology providers with over 20 years' experience in helping organisations deliver more through its portfolio of industry leading software solutions. Our 250-strong team in 6 offices across Australia and internationally has successfully worked with over 1,000 organisations.

Focusing upon Financials, Operations, Workplace, and Industry, Professional Advantage is the solution to all your IT needs. We are trusted advisors and providers of Microsoft Dynamics 365; Office 365; Dynamics GP; Dynamics CRM; BOARD; Infor SunSystems; Qlik; UpBeat; PerformancePlus; XMPro; Blackline; and Sharepoint.

We help businesses achieve more.

Become a High Performing Organisation:
Contact Professional Advantage

1800 126 499

www.pa.com.au

enquiries@pa.com.au

