

Lean Practices to Transform Your Finance Team

**Location: ACCA, Ground floor, The Adelphi, 1-11 John Adam Street
London, WC2N**

£550

Date: Thursday 13 June 2019

Programme overview

This course will help financial controllers, finance managers and corporate accountants learn how to adopt 21st century finance team better practices—and become more effective and future ready. Within months of attending you and your finance team will be creating a positive footprint.

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 so on the monthly finance report when it can be completed within three working days?

David Parmenter, author, performance management leader and international speaker has delivered this cutting-edge course to over 1,000 corporate accountants.

Programme description

Finance teams need to embrace the lean movement, slimming down all of their processes so they can be less locked in the past and becoming “warriors against waste” and adopters of the profound lean practices (such as Post-it Re-engineering, Scrum and Kanban).

This masterclass will cover:

- How to report month-end results faster – inside three working days
- The foundation stones for a two-week annual plan - the first steps to rolling forecasting and planning
- How to get your annual accounts signed off within three weeks
- Lean reporting — eye catching A3 one-page summaries, daily and weekly report templates
- Quality assurance steps to guarantee error free reporting
- How to get your KPIs to deliver

- Ways to reduce accounts payable volume by 60%
- How to sell and lead change successfully within your organisation (by changing their view of the future)
- The seven technologies you need to embrace (planning and forecasting tools, accounts payable systems, reporting, friendly front-end to the G/L, consolidation and intercompany, disclosure management and paperless board reporting)
- How to get continuous improvement (Kaizen) in the finance team
- Apply ten lean and smart work methods to transform the finance team (Scrum, Kanban, post-it re-engineering)

What you can gain

On successful completion of this course, you will be able to:

- Implement the lean practices, used by your peers
- Apply practices and techniques that will transform your finance team from good to great
- Deliver more services with less resources and in less time

Who Should Attend?

Finance directors, CFOs, financial controllers, finance managers, management accountants and financial accountants. Practitioners who act as the CFO for their larger clients.

Investment: The workshop fees are £550. The course comes with a whitepaper and associated electronic media valued at £100.

[To register](#)

Presenter

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. He is a leading expert in 21st century lean practices that help get the finance team future ready. David is also known for his ground-breaking KPI methodology. He has presented in 31 countries and published four books including *The Financial Controller and CFO's Toolkit* (3rd edition) and *Key Performance Indicators* (3rd edition).

David has worked for EY, BP Oil and PwC, among others. Visit davidparmenter.com for access to his articles, white papers and books.

Programme

Time	Session
08:30	Registration commences
09:00	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

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.

What has been said about the course

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 I am most encouraged 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

Thank you for the course yesterday. It was the best day's training I have had since my ICAEW training as there was so much actionable content. It really fired me up and I was pleased to note that our approach of doing helicopter-based forecasting is the right way to go. I will immediately discuss the one-page lean reporting with the CEO as I'm looking to implement them for our year end Board Meeting which is coming up in a couple of weeks.

Joanne Richardson - Group Financial Controller, Landmark Investment Group

I must say your course has motivated me to streamline our board reporting and our Directors are very happy with the outline already discussed.

Additionally, we are now working on streamlining our accounts payable process including implementing the "Purchasing card" as discussed at the workshop.

Derek Billcliff Chief Financial Officer, Apollo Projects Group Limited

Thank you for delivering an excellent course today. You were very engaging and motivating, and I'm really looking forward to implementing some new processes and exploring your ideas further and reading your suggested books. There were some great resources in the course materials.

Aaron Goodman, Financial Controller, RPS Australia Asia Pacific

One of our team members attended your lean finance team processes one-day 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 (was by working day 10. This is due to our system requiring invoicing on 8th of each month)*
- *Run daily scrums from working day -1 to working day 6 (stand up meetings lasting only five 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 took away and used the one A3 page CEO financial report and the "post-it" re-engineering. The benefits derived from these two implementations

were worth more than the course fee alone. I would recommend this course to all corporate accountants.

Caroline Miller, Financial Controller, French Country Collections Limited New Zealand

I have been able to totally revolutionize one of my clients' board meetings by implementing the A3 board report from the NZICA workshop you ran in Tauranga! They got caught on details during the board meetings and never got into the real issues and use that time to strategize. The 8 pages of various charts now fit on the same page as the financials avoiding time wasting during the meeting as people used to lose track of which page others were talking about. It still gives me a buzz when I prepare this page every month.

**Sylvia Dovaston, Dovaston Accounting & Business Solutions Ltd
New Zealand**

I would like to take this opportunity to say a big "Thank you" for the Lean accounting course you presented this week. I thoroughly enjoyed the day and cannot wait to become leaner and more efficient. Will definitely be on the lookout for any other training you might be giving again in Sydney.

Mark Schild, Group Management Accountant, Rubik Financial Limited, Australia

I have made some good changes to our processes here and it's going to benefit us as a group home builder with the growth we are experiencing in Chch and Auckland. We will be using some of the offering from your web site over the next few days. We have started the journey it's all Kaizen!

Thanks for such a great presentation and process you put us through.

Russell Judge, Group Accountant, Horncastle Homes, New Zealand

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 David's anecdotes added to the entertainment. The three main highlights for me were; David's

tight and punchy delivery style, access to soft copy templates to customise and implement in my organisation, and breakout sessions at the end of each section where you can discuss your thoughts with someone in a similar industry.

Amanda McPherson, Director of Finance, Melbourne Convention Exhibition Centre

Thank you again for the excellent course. The three main 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

We have had instant success with our Flash report. My Accounting team managed to get the flash report for November completed by 4.00pm on the second day. They even reconciled most of the Balance Sheet Accounts and didn't work any overtime. The workshop gave us the tools and the mindset to achieve this result.

Ron Milne General Manager – Finance & Operations, Enware Australia Pty Limited

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