

6<sup>th</sup> annual event

# Business Performance Management

Look beyond KPIs and scorecards to further improve the performance of your organization with more proactive and market-oriented controlling

Berlin, Germany

22<sup>nd</sup> – 24<sup>th</sup> May 2017

When inventing a **new KPI** is no longer enough to further **improve effectiveness**, where do you go next?

marcusevans

 Half-Day Interactive Conference Workshop on 24<sup>th</sup> May 2017

**The Convergence between Top-Down And Bottom-Up Approaches to CPM**

Attending This Premier **marcus evans** Conference Will Enable You to

- **Do more proactive** and business-oriented controlling
- **Drive** financial leadership with the right initiatives
- **Implement** rolling forecasts successfully
- **Discuss** beyond budgeting principles and implementation
- **Drive** change management and turnaround projects
- **Align** business performance with individual performance

Learn from Key Practical Case Studies

- **Sandoz International** discusses the skills required for finance business partners to contribute to value creation
- **Leax Group** shows how to move beyond KPIs to further improve the performance of the organisation
- **Merial** presents their approach to aligning operational and financial forecasting
- **Statoil** explains why traditional management no longer works and what to do instead
- **Philips** addresses reporting innovations: from operational profitability to management strategy
- **TNT** expands on CPM and Data Governance, and tangible improvements in the top and bottom line results

Expert Speaker Panel

**Martin Bischof**  
Regional CFO Western Europe  
**Sandoz International, Germany**

**Stefan Gros**  
CFO ad interim, Head of Finance & Controlling  
**Bridgestone Central Europe, Germany**

**Maurice Verhagen**  
Senior Director, Head of Reporting  
**Philips, The Netherlands**

**Kate Lumb**  
Head of Business Performance Management  
**Bilfinger GVA, UK**

**Srinivas Krishna**  
Director Shared Services Strategy & Economics, Finance Operations  
**Microsoft, The UK**

**Tobias Hägglov**  
CFO  
**LEAX Group, Sweden**

**Vera Krylova**  
Director Financial Planning & Analysis (Europe, India, Africa)  
**Amway, Germany**

**Chris Mathews**  
Head of Finance, Global Business Operations  
**Merial, France**

**Anwar Mirza**  
Global Head of Data Governance  
**TNT, The Netherlands**

**Jens Reichert**  
Associate Director, Head of Controlling  
**Amadeus Data Processing, Germany**

**Fabrice Noel\***  
Group Vice President, Head of Group Finance Projects (Group Function Finance and Controlling)  
**ABB, Switzerland**

**Petter Frissell**  
Finance Operations Director  
**Avast Software, Czech Republic**

**Bjarte Bogsnes**  
Vice President, Performance Management Development  
**Statoil, Norway**

**Arif Kamal**  
Chief Financial Officer  
**Thomas Cooper, UK**

**Tomi Koistinen**  
Head of Business Controlling  
**Snellman Group, Finland**

**Avo Schönbohm**  
Professor of Business Administration (Focus on Management Accounting)  
**Berlin School of Economics and Law, Germany**

*\*Subject to final confirmation*

08.30 Registration and Coffee

09.00 Opening Address from the Chair

**MOVING BEYOND KPIS**

09.10 **Case Study**  
**Finance Business Partnering: What Skills do Finance Business Partners Need to Drive Value Creation in the Organisation and How can they Be Developed?**

- People development challenges and concepts
- What is the role of finance business partner in the organization?
- Why is value creation important for finance?
- Which skills are required to contribute to value creation?
- How can we assess development requirements?
- How can we take development requirements into action?
- Developing skills in people beyond training and giving them a relevant 'real life experience' in the business context

**Martin Bischof**  
 Regional CFO Western Europe  
**Sandoz International, Germany**

09.55 **Case Study**  
**Pushing for Action-Driven Controlling, not Only Number-Crunching and Complex Models**

- Moving away from abstract measurements and too many KPIs to a forward-looking approach built around action-plans
- How to be closer to the business, understand it, and challenge it
- How to keep the focus on key initiatives

**Tobias Hägglov**  
 CFO  
**LEAX Group, Sweden**

10.40 **Refreshme**

11.10 **Case Study**  
**CPM and Data Governance- A Tangible Improvement in the Top and Bottom Line Results**

*This session will challenge companies on the completeness of their Information Governance strategies as a pre-requisite for successful Performance Management. Anwar sets the foundation for Data as the new basic business imperative and presents*

- How to set the targets and how to follow the actual figures
- The outline of a Data Governance program, framework and methodology that is embedded into the core of a company's foundation with a positive Business Case
- How to prove that Data Quality can be tangibly measured against the Top & Bottom Line results.
- The barriers to overcome in positioning or implementing Data Governance within an organisation
- The 'must do' practical Data Governance controls

**Anwar Mirza**  
 Global Head of Data Governance  
**TNT, The Netherlands**

**CHANGE MANAGEMENT**

11.55 **Case Study**  
**How Strong Performance Management can improve your Customer Service**

- The Importance of having the right framework
- Change Management Options:- Stealth v Big Bang
- Continuous Improvement – How do you know if it is still working for you
- People and the value they have to please and how to get the right culture

**Kate Lumb**  
 Head of Business Performance Management  
**Bilfinger GVA, UK**

12.40 Lunch

14.00 **Case study**  
**Controlling and Having Control: Can they Coexist in an Environment of Restructuring and Change?**

- Impact of political uncertainty (Brexit, fallout from US elections) on company structures and the financial organisation
- How to keep control over things when you are out-tasking restructuring, and outsourcing?
- Moving jobs to low-cost countries in reporting and controlling: Keeping your grip on audits and reviews
- How do you still do that with a mix of resources from central, local, and how do you ensure knowledge transfers?
- Reporting and how to apply controls proactively with fewer reviews

**Srinivas Krishna**  
 Director Shared Services Strategy & Economics, Finance Operations  
**Microsoft, The UK**

14.45 **Case Study**  
**Change Management and Turnaround Projects: How Finance Can Contribute**

- Challenging the way controllers think
- Feedback from newer companies operating in disruptive environments
- Lessons from companies where things are changing fast, where they have to adapt more radically, have fewer processes and have to manage change differently
- How to adapt to change, identify gaps and deliver analysis
- Adapting to consumer preference changes, tax implications or currency fluctuations
- How to work with specific customer data and customer segmentation

**Stefan Gros**  
 CFO ad interim, Head of Finance & Controlling  
**Bridgestone Central Europe, Germany**

15.30 **Refreshme**

16.00 **Case Study**  
**Business Performance Management as a Serious Game**

- Challenges for Performance Control in the 21<sup>st</sup> century
- Gamification for Customer and Employee Loyalty
- Seductive Interaction Design as the New Behavior Control Paradigm
- Examples of Serious Games in Strategic Planning, Risk Management & Budgeting

**Avo Schönbohm**  
 Professor of Business Administration  
 (Focus on Management Accounting)  
**Berlin School of Economics and Law, Germany**

**PANEL DISCUSSION**

16.45 **Non-Financial KPIs Used in Various Organisations for Business Performance Management as Compared to Financial KPIs and their Impact**

- Quantifying the organisation's strategic goals with KPIs such as brand equity, human capital, customer relationships, employee engagement, corporate social responsibility ('green issues')
- Assessing the different sets of KPIs and identifying the most relevant ones
- What is not measured, is not managed? Is this still the case? How do you measure more intangible results?

*Moderator:*  
**Arif Kamal**  
 Chief Financial Officer  
**Thomas Cooper, UK**  
*To be joined by speakers of the day and invited guests*

17.30 Closing Comments from the Chair and End of Day One

**23<sup>rd</sup> May 2017**

08.30 Registration and Coffee

09.00 Opening Address from the Chair

**EFFICIENCY OF THE FINANCE FUNCTION**09.10 **Case Study****Why Traditional Management No Longer Works, and What to Do Instead**

- The problems with traditional management, including budgeting
- The Beyond Budgeting principles and companies on the journey
- The limitations and pitfalls of KPI management
- Staitoil's "Ambition to Action" model: Redefining Performance- dynamic and relative with a holistic performance evaluation
- Dynamic forecasting and resource allocation and no traditional budgets
- From calendar-driven to event-driven: a More self-regulating management model
- Implementation experiences and advice

**Bjarte Bogsnes**Vice President, Performance Management Development  
**Statoil, Norway**09.55 **Case Study****Enhancing Business Partnership Focus via Leveraging Central Services Organisation**

- Building Financial Planning and Analysis (FP&A function that is actively driving strategic agenda
- Benefits of merging FP&A and Business Intelligence teams
- Self-service in BI and FP&A
- Leveraging shared services to produce complex analytical content
- The role of FP&A business partners
- Blueprint FP&A organization: drives value and saves finance cost to serve

**Vera Krylova**Director Financial Planning & Analysis (Europe, India, Africa)  
**Amway, Germany**10.40 **Refreshme**11.10 **Case Study****Aligning Business Performance with Individual Performance: Talent Management in Shared Services**

- How should you benchmark performance? How do you know what 'good' means?
- Taking the integrated view of financial and non-financial in performance management
- Staying on top of changing information needs and their impact on performance management
- How to assess and manage people's performance and compensate them in a way that it drives performance? Moving towards performance-driven pay
- Compensation issues: which type of performance should a performance-driven pay be about? Discussing relative performance (e.g. good performance to be defined for example as being in the top three)
- Disentangling a person's performance in a local office from the corporate results of the holding company

**Petter Frissell**Finance Operations Director  
**Avast Software, Czech Republic**11.55 **Case Study****Financial Leadership with the Right Initiatives**

- Leading a Global Gross to Net initiative to drive bottom line conversion of pricing programmes across Merial
- Creating a Business Management Review framework utilizing Qlikview reporting to align Regions around the key business performance metrics
- Introducing the NeO Switch Challenge which is an innovative managerial approach to incentivizing an organization to change product offerings
- Driving Integrated Business Planning: how to align operational and financial forecasting
- Business integration and impacts on performance management

**Chris Mathews**Head of Finance, Global Business Operations  
**Merial, France**

12.40 Lunch

**Booking Line:**

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Email: [LouiseP@marcusevansuk.com](mailto:LouiseP@marcusevansuk.com)**ROLLING FORECASTS & REPORTING**14.00 **Case Study****How to Implement Rolling Forecasts Successfully**

- Are there benefits?
- The desire to change finance to a more value-added activity: How far does that reach?
- Understanding the dynamics in the planning process, what kind of measures/drivers should be considered?
- Is the annual cycle still valid in a world that is changing much faster?
- What should be considered the transformation process?

**Tomi Koistinen**Head of Business Controlling  
**Snellman Group, Finland**14.45 **Case Study****Reporting Innovations: from Operational Profitability to Management Strategy**

- Aligning planning cycles
- Encouraging collaboration and meaningful conversation across business functions
- The information required for good business performance conversations
- Lean reporting: Going to the public faster
- Assessing the usefulness of self-service BI: Multi dimension visualisations combined with analytics
- Focusing on getting context in, rather than static reports
- Looking at financials and reporting from the human angle: how does it work when you are part of virtual teams?
- The balance between internal information and measurement of financial performance and external publication of financial measurement
- Discussing the perception of conflicting priorities between internal and external financial communication

**Maurice Verhagen**Senior Director, Head of Reporting  
**Philips, The Netherlands**15.30 **Refreshme****DIGITIZATION AND CHANGING IT TRENDS IMPACTING FINANCE**16.00 **Case Study****Impact of a Changing IT Business Model on Performance Management**

- From cost controlling and expense management to demand management and value creation
- Enabling increased data analysis skills within controlling
- Introducing It service costing and rolling forecast to bring transparency into TCO (total cost of ownership)
- Leveraging Lean IT to drive efficiency in key processes
- Continuous improvement of controlling services as enabler for business partnering

**Jens Reichert**Associate Director, Head of Controlling  
**Amadeus Data Processing, Germany**16.45 **Case Study****The Build of a Global Information Management System in ABB to Support Some Key Global Growth Initiatives**

- Why ABB started this journey and what has been done until now
- How we did it. What are the key performance indicators we focused on
- The benefits achieved already
- The next key deliverables for this programme

**Fabrice Noel\***Group Vice President. Head of Group Finance Projects  
(Group Function Finance and Controlling)**ABB, Switzerland****PANEL DISCUSSION**

17.30

**What will the Finance Organisation Look Like in the Future?**

- How to combine working in virtual teams with working in flat hierarchies
- 100 % finance in the future? What remains at the corporate level? Externalization? Going decentralized, or centralized?
- Assessing the increasing focus on functional excellence and the implications for finance
- Impact of the changes in how information is passed throughout the layers of the organisation
- Taking into account not only changes in culture, but also in the way P&L is reported: how to build up an efficient organisation

*To be joined by speakers of the day and invited guests*

18.00 Closing Comments from the Chair and End of Day Two

*\*Subject to final confirmation*

## The Convergence between Top-Down And Bottom-Up Approaches to CPM

24<sup>th</sup> May 2017

08.30 Registration and Coffee

09.00 Workshop Leader's Introduction and Opening Remarks

### The Convergence between Top-Down And Bottom-Up Approaches to CPM

- Matching your KPI driven approach (top-down) to an increasingly important bottom-up approach whereby you derive new insights and targets from the data available from multiple sources
- Looking at the data-driven aspects of performance: What is the data telling us and how can we act on it?
- How to drive the right behavior in the organisation: better data entry for more qualitative decision-making
- Making sure that what you want to measure is aligned with what the businesses want to know
- How to be in the driver seat for the analytics side of CPM, and thus get on the strategic agenda

12.00 Workshop Leader's Closing Remarks

*Attendees will be able to enjoy afternoon tea and networking opportunities midway through the workshop*

### Who Should Attend

- CFOs and Vice Presidents, Directors, Managers of:
- Finance
- Financial Control
- Performance Management
- Business Control
- Strategy Control
- Group Reporting
- Financial Planning and Analysis
- Business Intelligence

### Business Development Opportunities

Does your company have services, solutions or technologies that the conference delegates would benefit from knowing about? If so, you can find out more about the exhibiting, networking and branding opportunities available by contacting:

**Louise Pavis**, Marketing Manager, **marcus evans** London  
Tel: +44 20 3002 3244, E-Mail: [LouiseP@marcusevansuk.com](mailto:LouiseP@marcusevansuk.com)

### Conferences

For more than 30 years the world's leading organisations have relied on **marcus evans** to provide the strategic business insights they need to sustain a competitive advantage. Our global portfolio of over 1000 events per year focus on the cutting edge issues effecting senior decision makers across all sectors. Designed with industry leading practitioners for their peers in the industry, our event model is driven by the latest research on the critical issues affecting your business today. We cut through the vendor rhetoric and product showcasing to deliver tangible, practical insights direct from subject matter experts.

### Summits

Our global portfolio of over 150 annual summits focus on bringing the most senior decision makers face-to-face with the key solution providers capable of delivering on their strategic goals. Our summits provide an unbeatable environment within which to benchmark, innovate and drive your business forward by forging the relationships that matter most. Our cutting edge programmes featuring world renowned speakers deliver thought provoking content whilst our innovative one-to-one meeting platform ensures that you walk away with the insights and connections you need to accelerate the growth of your business.

### Corporate Hospitality

Leverage the emotion that the world's leading sporting events evoke together with your brand to deliver an unforgettable engagement experience for prospects, clients or employees. Boasting over 30 years of experience in providing corporate sports hospitality, our truly global portfolio includes such prestigious events as the Football World Championships, Summer & Winter Games, Superbowl, Formula 1 and many more. THG's goal is to ensure you only need to focus on your guests, allowing you to develop the relationships that are of critical importance to the future of your business.

### Professional Training

Your training needs are diverse and mission critical, with practical, vocation based training needing to be delivered in the right place at the right time. Benefit from a training provider with more than 30 years of experience delivering professional training to the world's leading companies on a global basis. **marcus evans** professional business training delivers targeted vocational and technical training solutions. These include professional development courses, specialist sector focused training, in-house bespoke training as well as language and cultural training for businesses.

### Technology Forums

**marcus evans** technology forums are the facilitator in identifying the current and future technological needs of businesses and provide the ideal platform to assist with making these investments. Our global forums bring together decision makers within key industries with carefully selected and researched technology providers. World class case studies give delegates critical insight to make informed decisions about how these technology solutions can create profit for their company and stay ahead in increasingly competitive markets.

### Language and Cultural Training

**marcus evans** linguarama offers effective training in language, communication and culture for business and professional people. With more than 45 years' experience and over 20 centres in Europe, we are one of Europe's largest business language and communication training organisations. Each year **marcus evans** linguarama trains people from over 60 countries worldwide and provides over 1,000 companies and organisations with total training solutions. Our courses are focused entirely on the needs of the individual participant or group and have practical relevance to business and professional life.