

# Management accounting

Driving business value and viability toward a sustainable future



Two-day conference including master classes

**Perth:** 4 – 5 August  
**Brisbane:** 12 – 13 August  
**Sydney:** 19 – 20 August  
**Melbourne:** 23 – 24 August

**Management accounting is now central to the operations and strategic direction of any organisation. Growing emphasis is placed on transforming the finance function to act as a driver in creating value and managing performance toward business viability and sustainability.**

**To be effective, the modern management accountant must possess a comprehensive understanding of the organisation, balance accounting and business building skills and serve as the principal source of information that drives decision making, control and improvement.**

This conference brings together business leaders and industry experts who will provide you with the opportunity to explore and exchange ideas around emergent thinking, developing insights from current trends, and sharpening your ability to detect and overcome barriers.

## Key benefits

- + Develop visionary and accounting leadership skills
- + Better communicate strategies and information with stakeholders at all levels
- + Positively influence business value and viability outcomes
- + Improved understanding of shared services and associated process and cost efficiencies
- + Examine industry case studies on innovative sustainability practices
- + Discover an integrated approach to risk management and performance reporting practices
- + Harness knowledge in critiquing the integrity of key business and finance models

## Key speakers

### Michael Sammells FCPA

Chief Financial Officer,  
Medibank (WA only)

### David Felthun

Senior Vice President & Chief Financial Officer,  
McDonalds (NSW, VIC, WA)

### Richard Sargent

Head of Finance,  
BP Castrol Lubricants ANZ (QLD only)

### George Savvides

Managing Director,  
Medibank (QLD only)

### Andrew Crawford FCPA

Head Consultant,  
Group Executive Office, Westpac (VIC, WA)

### Joseph Soalheira FCPA

Independent Shared Services Practitioner  
(NSW, QLD only)

### Paul Thambar

Lecturer, University of Technology & President,  
Chartered Institute of Management Accountants Australia  
(NSW, QLD, VIC)

### Shenaz Khan

General Manager, People,  
BT Financial Group (NSW only)

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# Overview

In these uncertain times, the onus on management accountants to act as business partners, value creators and key contributors to driving business value is even higher. To gain competitive advantage, it is essential to compliment traditional practices with innovative approaches to enable strategic decision-making that sets forth toward a more sustainable future.

Undertaking professional development is an investment in the success of both you and your organisation. With a formidable line-up of industry experts, progressive business leaders and leading-edge case studies from within the management accounting field, the choice to attend this conference has never been easier.

Why you should attend

- + Hear the latest thinking to emerge in the management accounting field
- + Exchange views with industry experts and like minded professionals
- + Contextualise key forthcoming challenges and gain practical 'how to' perspective on tackling them
- + Select from a blend of topical sessions and case studies specifically tailored to your professional needs

Who should attend?

- + Management accountants
- + Finance managers
- + Business managers
- + General managers
- + Finance directors
- + Financial controllers
- + Chief financial officers

## Management accounting – day one

8.30am – 8.55am	Registration and arrival refreshments
8.55am – 9.00am	Opening remarks and welcome from the chairperson
9.00am – 10.00am	<b>Keynote 1</b>
<b>KN1</b>	Creating a high performance culture
<p>Most leaders today are in pursuit of a high performing culture, and the greatest challenge is getting people to think in similar terms about the purpose of the business and understanding their individual contribution toward accomplishing that purpose. This session will outline a tried and tested roadmap to changing organisational behaviour, and provide guidance in implementing, promoting and sustaining a high performance culture.</p> <p>It will address:</p> <ul style="list-style-type: none"><li>+ What does a high performance culture mean?</li><li>+ How do leaders create it?</li><li>+ How do you measure it?</li><li>+ How to engage employees in the journey?</li><li>+ The experience, key achievements and lessons learnt</li></ul> <p><b>WA: Mathew Bullen</b> Director, MABU Packaging</p> <p><b>NSW: Shenaz Khan</b> General Manager, People, BT Financial Group</p>	
9.00am – 10.00am	<b>Keynote 1</b>
<b>KN1</b>	Case study: Effective management systems – creating value with a lean strategy
<p>Waste can be found in most things that occur within all our workplaces and is usually a result of ineffective work processes and practices. Kangan Institute was the first education provider to begin the lean journey, which has seen the development of a culture within its management and staff that is tuned in to eliminating waste. In this insightful and informative session, Richard Turnbull will detail some of the challenges faced and benefits achieved, providing practical insights on how value was created as a result of several iterations using lean.</p> <p><b>QLD, VIC: Richard Turnbull</b> Chief Financial Officer, Kangan Institute</p>	
10.00am – 10.30am	Morning tea and networking break

10.30am – 11.30am	Concurrent sessions A
A1	Shared services: optimise internal processes for effective service delivery and cost efficiency

Management accountants and executives need to understand the key drivers for shared services and the impact they can have on reducing operating costs, increasing productivity, enabling more efficient service delivery, and strategy execution. This case study session will provide a practical 'how to' implement shared services, and how to continue driving maturity. It will outline how to:

- + Provide guidance on selecting the right projects and services for adoption
- + Identify hidden cost savers
- + Create win-win opportunities
- + Deliver better internal controls and a better risk reward for the organisation

**NSW, QLD: Joseph Soalheira FCPA**

Independent Shared Services Practitioner

**VIC, WA: Andrew Crawford FCPA**

Head Consultant, Group Executive Office, Westpac

OR

A2	Performance reporting, action planning and forecasting
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One of the keys to effective management accounting is being able to communicate with your stakeholders at all levels, whether that stakeholder is internal or external to your business. Many stakeholders don't understand the accounting language which can often make communication a challenging task.

This session will focus on working with your stakeholders to:

- + Identify what can be improved in the business
- + Develop an action plan to address the improvement areas
- + Report on progress of the action plan
- + Identify what cash the business can generate

**NSW, WA: Stephen Krygger CPA**

Finance Manager - Supply & Logistics, BP Australia

**VIC, QLD: Gerry Maguire FCPA**

Director, CFO Connection

11.35am – 12.35pm	Concurrent sessions B
B1	Innovation in sustainability management

Management accountants and business managers are in an ideal position to help organisations interpret sustainability issues in a relevant way for their organisations, and to integrate those issues into the way they do business. This insightful session will draw on a range of industry case studies to assist you in your role as knowledgeable change agent by outlining an initial best practice framework for managing sustainability change.

**NSW, QLD, VIC, WA: Dr Retha Wiesner**

Associate Professor in HRM, University of Southern Queensland

OR

B2	Considering risk, return and ranking in business modelling
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In the aftermath of the GFC, business leaders are placing an ever-growing reliance on business and financial models. Quantifying decisions is commonplace and Excel models are frequently pivotal in refinancing, acquisition, project finance and working capital / cash flow management project appraisals.

But does senior management always have the necessary skills to objectively critique and review these key models?

This overview considers risk, return and ranking in business modelling and provides examples of how end users can test the integrity of the model, in tandem with the assumptions, to provide greater comfort in making business-critical decisions.

**NSW, QLD, VIC, WA: Liam Bastick**

Director, SumProduct

12.35pm – 1.35pm	NL1: Lunch and networking break
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1.35pm – 2.35pm	Keynote 2
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KN2	Leading transformation – the role of the finance function in driving organisational success
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The finance function has a key part to play in developing competitive strengths by re-engineering business processes, identifying process waste, removing the non-value adding activity, and continuously improving the business so that costs go down without compromising on service. In this session, George Savvides or Michael Sammells will address the importance of organisational renewal and building new competencies that develop the competitive strengths that sustain exceptional performance.

They will take you behind the scenes at Medibank and uncover how they used their 'purpose journey' to build competitive strengths and turn Medibank around.

**WA: Michael Sammells FCPA**

Chief Financial Officer, Medibank

**QLD: George Savvides**

Managing Director, Medibank

1.35pm – 2.35pm	Keynote 2
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KN2	Leading finance teams – the importance of the finance function in organisational change and business viability
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In this session, Gary Stewart will examine the role that executive leadership has in driving long term viability of businesses in the global context and the role that finance and costing must fulfil in developing the right business case to support strategic decision making to suit this new 'Global' world.

Gary will explore sustainable approaches and outline how the development of new 'leadership' models focusing the entire business on design for 'whole of product life' can aid in better customer, quality, cost and business viability outcomes.

**NSW, VIC: Gary Stewart**

Former General Manager, Aisin

<b>2.40pm – 3.40pm</b>	<b>Concurrent sessions C</b>
<b>C1</b>	Communicating effectively – presentation skills for the accounting professional

It is widely accepted that it is not just ‘what you say’, but ‘how you say it’, which determines the outcomes, your influence and, in many cases, your career direction. To be truly successfully, every accounting, business and finance professional must be able to confidently communicate financial information, strategies and ideas to small and large audiences, and stakeholders at all levels.

This session will focus on:

- + What differentiates a good presentation from a bad one?
- + What techniques do luminary speakers use?
- + How to avoid being the executioner in the ubiquitous and unpopular play; ‘Death by Powerpoint’

**WA: Geoffrey Harris FCPA**

Director, CDC Liberty

**NSW, QLD, VIC: Gerard Byrne FCPA**

Director, Business Development, Faculty of Law, Business, and Creative Arts, James Cook University

OR

<b>C2</b>	Case study: Driving performance to increase business value
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In this insightful case study session, David Felthun will outline some tips and traps in driving improvement to performance. He will take you on a journey through the transformation of McDonald’s toward increased business value in addressing:

- + Aligning the finance team with the corporate strategy
- + Where finance added value to the organisation
- + Instilling a culture of continuous improvement
- + Tools and KPIs used to drive performance

**NSW, VIC, WA: David Felthun**

Senior Vice President & Chief Financial Officer, McDonalds

<b>C2</b>	Case study: Driving performance to increase business value
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Ensure performance management can partner the business to generate additional value through using specialist finance strategies, skills, tools and appropriate interventions. In the form of a case study, Richard Sargent will outline how this can be effectively applied with a focus on:

- + Mix analysis used to understand hidden shifts in product costs and pricing
- + Using dashboards to quickly focus on material issues
- + Using ABC to drive out waste and generate profit enhancing behaviours
- + Price waterfalls used to identify opportunities for margin improvement
- + Project deliverables and the relationship with outcome oriented plans

**QLD: Richard Sargent**

Head of Finance, BP Castrol Lubricants ANZ

<b>3.40pm – 4.05pm</b>	Afternoon tea and networking break
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<b>4.05pm – 5.05pm</b>	<b>Keynote 3</b>
<b>KN3</b>	Reinventing finance: value creators and trusted business partners

Academic and practice based research evidences the need for finance to be more than just number-crunchers and backward looking accountants. Global surveys of CEOs’ and CFOs’ suggest that the future for finance lies in it becoming a value creator and a trusted business partner. To achieve this position, finance needs to be good at balancing and executing two key areas; finance efficiency and business insight.

This session will provide an informative and thought-provoking perspective on reinventing finance, and provide insights into a range of issues including:

- + Improving finance processes and applications
- + Designing appropriate management accounting systems to drive business insight and strategy
- + Developing finance ‘soft skills’

**NSW, QLD, VIC: Paul Thambar**

Lecturer, University of Technology & President, Chartered Institute of Management Accountants Australia

<b>4.05pm – 5.05pm</b>	<b>Keynote 3</b>
<b>KN3</b>	Harnessing the power of strategic management accounting for successfully achieving business outcomes

Organisational success is enhanced by integrating strategy with business performance for managerial decision-making. Therefore, by embedding strategic management accounting in strategic and operational processes for planning, measuring, implementing and reporting can lead to achieving the competitive advantage.

This thought provoking keynote provides insights to decision-making using strategic management accounting for bridging the business outcome gaps and covers issues including:

- + Robust decision-making for strategic options
- + Aligning strategy, operations, forecasts and budgets
- + Executing strategy using scorecards, drivers and indicators
- + Advanced decision-making capabilities with scenario planning, value-based and activity-based management
- + Scorecard for strategic oversight
- + Business intelligence for real-time decision-making

**WA: Atul Chandra FCPA**

CEO, Trans Business Dynamics, and Senior Lecturer, Edith Cowan University

<b>5.05pm – 5.10pm</b>	Closing remarks and close of day one
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# Day two – Master classes

**8.30am – 9.00am** Registration and arrival refreshments

**9.00am – 12.30pm** **Master class 1**

## MC1

Integrated risk management practices for enhanced organisational performance

Good strategies can often fail. Yet despite the obvious importance of good systematic planning and execution, relatively few managers are focused on the processes and leadership to turn strategies into measurable performance results through the innovative and integrated use of various management tools and approaches.

### Why you should attend

This master class provides a practical approach for organisations to implement their strategy through the integrated use of effective risk management practices, proper planning, monitoring and review mechanisms, and effective budgeting, reporting and assurance frameworks.

### Key areas to be covered

- + Understanding organisational structures and corporate objectives
- + Systematic 'cascading' of strategies and objectives
- + Aligning objectives, resources and processes throughout the different parts and levels of the organisation
- + Integrated but innovative use of effective risk management practices, proper planning, monitoring and review mechanisms, and effective budgeting, reporting and assurance frameworks

### Who should attend

- + Management accountants
- + Strategy and risk officers
- + Line managers
- + Finance managers
- + General managers
- + Finance directors
- + Chief financial officers

### About the presenter

#### NSW, QLD, VIC, WA: Patrick Ow

Risk Management Advisor

Patrick is experienced in business and cutting-edge performance management techniques. He has helped organisations improve their performance and staff productivity through the integrated but innovative use of various management tools and practices, which includes risk management practices and the development of corporate and cascaded scorecards.

**12.30pm – 1.30pm** Lunch and networking break

**1.30pm – 5.00pm** **Master class 2**

## MC2

Budgeting in uncertainty – insights to better budgeting negotiations

How often have we commenced the budget planning, control and evaluation process with a sense of , trepidation , conscious of the politicisation and game playing that often comes with the process? This session attempts to transform how you view the budgeting process, and subsequently redefine your value adding in an organisation.

### Why you should attend

This session will focus on outlining tools and techniques for managing the ambiguities inherent in the budget planning process. It will draw on the potential for accountants in the budget process to transcend a scorekeeping role to that of a more strategic, decision making role with line managers and senior executives. New ways of integrating scenario analysis into the budget negotiation process will be discussed.

### Key areas to be covered

This master class will explore the following areas:

- + Identifying the sources of budget problems
- + Observing the sources of ambiguity in budget planning and providing strategies to tackle them
- + Identifying and applying negotiation methodologies to obtain a reasonable and fair budget allocation
- + Reflecting on the challenges arising when using budgets as a source of evaluation in ambiguous contexts
- + Identifying methodologies to control and evaluate performance better, in uncertain settings
- + Re-thinking the role of the accountant

### Who should attend

- + Management accountants
- + Chief executive officers
- + Chief financial officers
- + Budget committee members
- + Business unit / line managers
- + Finance directors

### About the presenters

#### NSW, QLD: Dr Prabhu Sivabalan

Senior Lecturer, University of Technology, Sydney

Dr. Prabhu Sivabalan is a senior lecturer in accounting at the University of Technology, Sydney and an industry expert in budgeting. Having completed a PhD in budgeting, strategy and management control systems, Prabhu continues to work with companies and researches budget practice internationally.

#### VIC, WA: Joss Milner

Principal, Milner Corporation

Joss Milner has been working with Banks in the area of SME financial performance for the past 14 years. His work has taken him to all corners of the globe and he has worked with Banks in Australia, USA, Asia & Europe. In 1999 Joss co-founded Inmatrix Pty Ltd, which developed financial analysis software for banks, the Inmatrix products Joss designed are now used by over 200 financial institutions around the world, including the major Australian banks.

**5.00pm – 5.05pm** Closing remarks and close of conference

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Address

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Special requirements (eg. dietary)

\*Required information so we can contact you regarding your registration.

## 2 Select your venue

State	Date	Venue	Event Code
WA	4 – 5 Aug	Duxton Hotel Perth, 1 St Georges Terrace, Perth	WA101041
QLD	12 – 13 Aug	Marriott Hotel Brisbane, 515 Queen Street, Brisbane	QL101041
NSW	19 – 20 Aug	Dockside Convention Centre, Balcony Level, Cockle Bay Wharf, Sydney	NS101041
VIC	23 – 24 Aug	RACV Club, 501 Bourke Street, Melbourne	VI101041

## 3 Choose your package (inclusive of GST)

		Early bird Pay by 16 Jul	Standard Pay after 16 Jul	Group (3+) from the same organisation
<b>Two-day package</b> Day one conference and day two master classes	Member	<input type="radio"/> \$1,450	<input type="radio"/> \$1,690	<input type="radio"/> \$1,160
	Non-member	<input type="radio"/> \$1,850	<input type="radio"/> \$2,100	<input type="radio"/> \$1,160
<b>One-day package</b> Day one – conference	Member	<input type="radio"/> \$850	<input type="radio"/> \$950	<input type="radio"/> \$660
	Non-member	<input type="radio"/> \$1,025	<input type="radio"/> \$1,155	<input type="radio"/> \$660
<b>One-day package</b> Day two – master classes	Member	<input type="radio"/> \$850	<input type="radio"/> \$950	<input type="radio"/> \$660
	Non-member	<input type="radio"/> \$1,025	<input type="radio"/> \$1,155	<input type="radio"/> \$660
<b>Half-day master class package</b> Either morning or afternoon on day two	Member	<input type="radio"/> \$480	<input type="radio"/> \$555	<input type="radio"/> \$400
	Non-member	<input type="radio"/> \$595	<input type="radio"/> \$675	<input type="radio"/> \$400

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## 4 Program at a glance

### Day one – conference

8.30am – 8.55am	Registration and arrival refreshments
8.55am – 9.00am	Opening remarks and welcome from the chairperson
9.00am – 10.00am	<b>Keynote 1</b> <b>KN1: (NSW, WA)</b> Creating a high performance culture <b>(QLD, VIC)</b> Case study: Developing effective management systems – creating value with a lean strategy
10.00am – 10.30am	Morning tea and networking break
10.30am – 11.30am	<b>Concurrent sessions A</b> (Your choice from) <input type="radio"/> <b>A1:</b> Performance reporting, action planning and forecasting <input type="radio"/> <b>A2:</b> Shared services: Optimise internal processes and increase cost efficiencies
11.35am – 12.35pm	<b>Concurrent sessions B</b> (Your choice from) <input type="radio"/> <b>B1:</b> Case study: Innovation in sustainability management <input type="radio"/> <b>B2:</b> Considering risk, return and ranking in business modelling
12.35pm – 1.35pm	<b>NL1:</b> Lunch and networking break
1.35pm – 2.35pm	<b>Keynote 2</b> <b>KN2: (QLD, WA)</b> Leading transformation – the role of the finance function in driving organisational success <b>(NSW, VIC)</b> Leading finance teams – the importance of the finance function in organisational change and business viability
2.40pm – 3.40pm	<b>Concurrent sessions C</b> (Your choice from) <input type="radio"/> <b>C1:</b> Communicating effectively – presentation skills for the accounting professional <input type="radio"/> <b>C2:</b> Case study: Driving performance to increase business value
3.40pm – 4.05pm	Afternoon tea and networking break
4.05pm – 5.05pm	<b>Keynote 3</b> <b>KN3: (NSW, VIC, QLD)</b> Reinventing finance: Value creators and trusted business partners <b>(WA)</b> Harnessing the power of strategic management accounting for successfully achieving business outcomes
5.05pm	Closing remarks and close of day one

### Day two – master classes

8.30am – 9.00am	Registration and arrival refreshments
9.00am – 12.30pm	<b>Master class 1</b> <b>MC1:</b> Integrated risk management practices for enhanced organisational performance
12.30pm – 1.30pm	<b>NL2:</b> Lunch and networking break
1.30pm – 5.00pm	<b>Master class 2</b> <b>MC2:</b> Budgeting in uncertainty – insights to better budgeting negotiations

NB: The topics on this program are provisional and may be subject to change.

## 5 Make your payment

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