

CFO Live Virtual - Forward Look at the Virtual CFO

argyleforum.com/cfo-live-virtual-2020-november/

Agenda

Day 1 (Nov 4th Wed)

11 AM - 12 PM ET

KEYNOTES ADDRESS featuring Andy Buckley

Andy Buckley served as a Financial Advisor at a major bank for 12 years, part of a group managing over 400m in personal assets. This provided perfect background material for his fictional role as, David Wallace, CFO of the Dunder Mifflin Paper Company, playing opposite Steve Carrell on NBC's hit comedy The Office.

Join us as we kick off Day 1 of CFO Live with an entertaining and high energy keynote session. Andy will reflect on his time playing the CFO at Dunder Mifflin Paper Company and his real-life experience as a Financial Advisor, drawing parallels to the expanding role of the modern CFO.



Andy Buckley

Entertainment Speaker, CFO of Dunder Mifflin on NBC's "The Office", Event Emcee, and Senior Financial Advisor (In real life)

12:05 PM - 12:35 PM ET

THOUGHT LEADERSHIP: Agile Finance Unleashed: New Operating Model for Digital Finance Leaders

Digital disruption is making current business models obsolete and finance organizations have no option but to leverage technology and data in order to transform or become a casualty. The finance function faces unprecedented challenges and must drive its own transformation agenda to adopt a new business model and help drive business transformation. Join this session with Kimberly Ellison-Taylor, Executive Director of Finance Thought Leadership at Oracle and a past chairman of AICPA (American Institute of

Certified Public Accountants) as she shares research and insights on the impact of technology on the finance function of the future and the imperative for organizations to adopt a new operating model for finance.

After this session, you will be able to:

- Understand the key pillars of the new operating model for modern finance
- Recognize the traits of an agile finance leader and see how finance can help support business agility and resilience through uncertain times

Hosted by:

Oracle



Kimberly Ellison-Taylor

Past Chairman, Association of International CPAs and Executive Director, Finance Thought Leadership

Oracle

12:40 PM - 1:30 PM ET

PANEL DISCUSSION: Payment Automation: Accelerating the Future of Payments

As the world goes digital, payment automation continues to advance by offering organizations a solution to make various types of electronic payments. The implementation of payment automation eliminates manual tasks and creates more effective processes which extends benefits to your organization. Benefits include increased visibility, reduced error, lower costs, and heightened fraud detection.

In this panel discussion, topics of discussion will include:

- Implementing payment automation within your organization
- Shortening lengthy processing cycles and improving efficiency
- Removing manual tasks while increasing control over processes

Moderator:

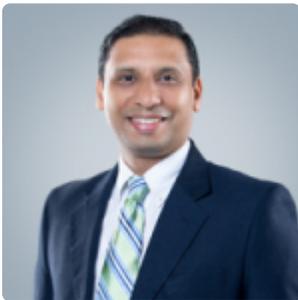


Tad Fordyce
Senior Vice President, Product for Corporate Payments
Comdata

Panelists:



Ann Anthony
Chief Financial Officer
Key Capture Energy



Nayab Siddiqi
Chief Financial Officer and Head of Strategy
REZY360 Inc.

1:30 PM - 1:45 PM ET

Afternoon Break

1:45 PM - 2:15 PM ET

THOUGHT LEADERSHIP: The Influential CFO: How CFOs Can Lead with Data and Drive Business Value Creation

The financial landscape continues to evolve, but with the right information, today's CFO can extract a significant amount of enterprise value from data, gaining insights and positive results from more meaningful actions. In order to compete in today's digital economy, CFOs must be able to effectively harness their data as an enterprise asset, derive insight from information, and create business value from their data.

This session will address:

- How CFOs can lead with data to drive business value creation
- A practical approach to becoming a data-empowered CFO
- How to approach empowering your teams to drive more value
- Real world examples of leveraging financial data for business value creation
- Practical use cases of the latest tools and techniques
- How to arm your FP&A teams with enhanced statistical modeling capability

Hosted by:

RSM



Rich Davis

Principal, CFO Services

RSM US LLP

2:20 PM - 2:50 PM ET

KEYNOTE: Physical to Virtual: FP&A's role in Product Digitalization

As global trends continue to embrace digitalization during the COVID era, companies, especially smaller players, are facing severe resource constraints to transform product lines and distribution channels in search of new customer value proposition. FP&A plays a critical role in delivering on the transformation strategies and operational procedures for product's digital transformation. This includes strategic planning, analytics, and performance measurement, to gain market share with optimized cash management.

This session will explore:

- An overview of trends in product digitalization during the COVID era
- FP&A's function on product digitalization – striking a balance between gaining market share and conserving cash
- Mini Case Study: Digital transformation of Argyle Group's event business



Terence Lo, CAIA
Senior Manager – FP&A and Finance Operation
Argyle Group

2:55 PM - 3:25 PM ET

THOUGHT LEADERSHIP: The State of the CFO - Bullish and Building Back

CFOs were quick to cut in April to conserve cash. Now, they're ready to get back to spending as usual—much more quickly than other leaders in their businesses. NetSuite's Brainyard fall survey set out to determine how CFOs are spending their time and discover what other business leaders think of their CFO's performance. During this session, NetSuite will explore key findings from the Brainyard Fall 2020 State of the CFO Survey. Join us as we explore the evolving role of CFOs and the finance department, and top priorities for 2021.

Some of the key findings that will be discussed include:

- Consistent CFOs priorities: financial planning, bookkeeping, and reporting
- Top 4 spending areas: IT, payroll, marketing, and sales.
- The outlook for 2021 – we predict commercial real estate will not come back anytime soon.

Hosted by:
Netsuite



Megan O'Brien
Finance and Business Editor -Brainyard
Oracle NetSuite



Art Wittmann
Content Director - Brainyard
Oracle NetSuite

3:25 PM - 3:45 PM ET

Afternoon Break

3:45 PM - 4:15 PM ET

THOUGHT LEADERSHIP: Achieving Multi-Entity Nirvana - Standardizing Your Global Reporting Process Across Local Jurisdictions

Connecting your data, documents, and processes is just the first step in standardizing your global process across local jurisdictions. Hear best practices from Workiva experts on how they helped practitioners to standardize their legal entity reporting, to meet existing and emerging regulations. Learn how to tackle new challenges head on, and leave with an understanding of what it takes to achieve multi-entity peace of mind and reporting nirvana.

After this session, you will be able to:

- Identify how a common approach to parent and subsidiary accounting reduces accounting risk by improving consistency in group accounting

- Explain how a standardized system of work delivers operational efficiency in financial statement preparation.
- Develop a cross functional collaboration between tax, finance and accounting teams, and achieve increased trust and assurance in published financial statements

Hosted by:

Workiva



Raïsa van Olden
Senior Product Marketing Manager
Workiva



Jeremy Hopkins
Solutions Engineer
Workiva

4:20 PM - 5:10 PM ET

PANEL DISCUSSION: Scenario Planning During Changing Times

Everyone has been dealing with some type of change during the last 6 months, often at multiple times during a short period, which has meant a lot of decision-making. Scenario planning models help with this process, if they are completed timely and efficiently, with relevant factors taken into account.

During this interactive panel discussion, we will explore:

- How businesses are using scenario planning models to better work through short-term challenges and plan for an unpredictable future
- The discipline of scenario planning in theory and in practice, including practical advice on how to get organizational alignment

Moderator:



CB Bowman, MCEC, MBA, BCC, CMC
CEO Workplace Racial Equality, LLC and Association of Corporate Executive Coaches
(ACEC)

Panelists:



Monica Vincent Prokocki
Senior Director, Corporate Financial Planning & Analysis
Edwards Lifesciences



Joseph Falcao
Chief Financial Officer & Treasurer
Thrasio



Keith Neal
Senior Vice President & Chief Financial Officer
Advocates

Day 2 (Nov 5th Thu)

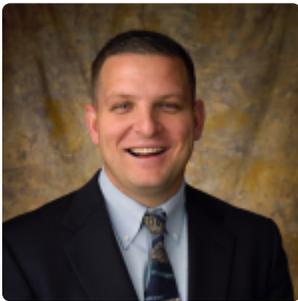
10:05 AM - 10:55 AM ET

FIRESIDE CHAT

Abstract coming soon!

Hosted by:

IBM



Lee Kroll
Americas Finance & Accounting Cognitive Process Services Leader
IBM Services

11 AM - 11:35 AM ET

KEYNOTE PRESENTATION: CFO Leadership in the Age of COVID-19

The transformation of the CFO role is nothing new, however, COVID-19 has presented senior finance leaders with challenges that are accelerating the transformation with a new sense of urgency. So what does the role of the modern CFO look like, especially now?

During our opening keynote session Bob Kolodgy, Executive Vice President & Chief Financial Officer at Blue Cross Blue Shield Association will share his thoughts. Additional topics of discussion will include:

- The skills and capabilities that Finance Teams need to succeed
- CFO Leadership and how to build resiliency in uncertain times
- Lessons learned since the start of the pandemic and how to apply them moving forward
- Challenges and opportunities in health care for the year ahead and beyond



Bob Kolodgy
Executive Vice President & Chief Financial Officer
BCBSA

11:35 AM - 12:25 PM ET

PANEL DISCUSSION: Future Look at 2021 - Diversity & Inclusion in Finance – Employing a Diverse Team

Now, more than ever, diversity and inclusion remain an integral part of an organization. A diverse workforce is beneficial for many reasons including increasing employee satisfaction, strengthening company culture, and elevating collaboration among leaders with different backgrounds. Organizations continue to work towards inclusion goals, and it is crucial for the finance function to approach hiring in a way that will heighten diversity efforts.

In this session, topics of discussion will include:

- Promoting inclusion programs and implementing training on diversity
- Understanding the impact D&I has on your organization
- Developing metrics and measuring D&I initiatives

Moderator:

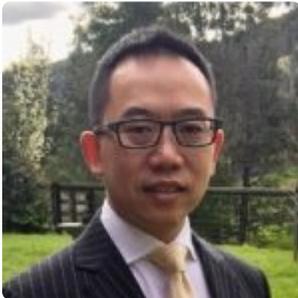


Jasmine Paul
Finance Expert

Panelists:



CB Bowman, MCEC, MBA, BCC, CMC
CEO Workplace Racial Equality, LLC and Association of Corporate Executive Coaches
(ACEC)



Kenny Cheung
Chief of Procurement
The World Bank Group



Herma Maria Lora
Chief Financial Officer, LATAM Export Luxury BU
Coty



Jeanette Wade
Chief Financial Officer
Ascentria Care Alliance

12:30 PM - 1 PM ET

THOUGHT LEADERSHIP
Abstract coming soon!

Hosted by:
Microsoft



Stephanie Rodriguez
Sr Director Finance, US Commercial
Microsoft

1:05 PM - 1:55 PM ET

PANEL DISCUSSION: Facing the Future - How to Up-Level your Finance Department with the Help of AI
Now, more than ever, there is an urgent need for finance and accounting teams to act with increased speed and accuracy to help their organizations remain agile and compete amid today's disruption. In addition to acquiring, upskilling, and retaining top talent, many CFOs

are leveraging automation and AI.

So, what does hiring and retaining finance talent look like as 2020 comes to a close and how is AI impacting how teams are structured, both today and in the future? In this panel, topics of discussion will include:

- How technology is impacting talent management
- Evaluating the strategies organizations used to pivot during a crisis
- The skills and capabilities needed to succeed today
- Transforming your finance back office to improve accuracy and accelerate decision making, especially during times of disruption and uncertainty
- Overcoming the most manual back office processes to free up time for value-added activities

Moderator:



Sue Cheung
Chief Financial Officer
QuickLogic Corporation

Panelists:



Sridhar Ramasubbu
Chief Financial Officer
Brillio



Mark Stagi
VP of Customer Success
AppZen

1:55 PM - 2:15 PM ET

Afternoon Break

2:15 PM - 2:45 PM ET

THOUGHT LEADERSHIP: Key Priorities for CFOs: Insights from Our Recent Global Survey of Over 1,000 CFOs & Finance Leaders

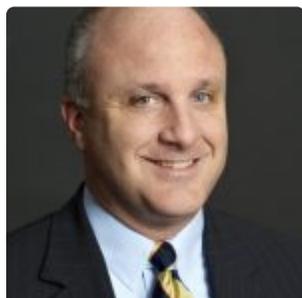
CFOs and finance leaders are leveraging hard-earned lessons from the worldwide pandemic to strengthen organizational agility and resilience.

In the midst of the pandemic, CFOs and finance leaders from a broad cross-section of public and private companies responded to our survey on their key priorities, the impact of COVID-19 on their organization, and staffing and resourcing, among other topics.

In this session, we'll share data and insights on how finance executives are:

- Adjusting to having a seat at the strategic table
- Guiding the organization's reporting and budgeting
- Meeting the changing demands of internal customers
- Managing their own finance teams

Hosted by:
Protiviti



Chris Wright
Managing Director
Protiviti

2:50 PM - 3:20 PM ET

PRESENTATION: Finance and IT - Working Together to Innovate

Finance and IT leaders continue to innovate together and effectively implement emerging technologies. With a push to the digital landscape, new technologies are critical to implement but it is imperative to understand the financial costs. Finance and IT teams must work together to develop better processes to meet an organization's need of effective and efficient innovation ambitions.

Join this session, which will address:

- Calculating the value of technology transformations and new initiatives
- Prioritizing investments within budgeting limits
- Evolving roles of IT and Finance and strengthening cross-department relationships



Roxi Wen, CFA
Chief Financial Officer
Mozilla

3:20 PM - 3:30 PM ET

Afternoon Break

3:30 PM - 4 PM ET

THOUGHT LEADERSHIP: Digital Transformation - Preparing Your Business for What's Ahead

Despite the momentary pause on business travel, industry experts anticipate companies will eventually return to the road. And when travel does resume, these trips will be essential to relationship-building and produce a high return on investment.

Corporate travel is critical to ensuring ongoing success and business recovery, which is why organizations cannot afford to leave it out of their digital transformation strategy.

Join this session to learn more about:

- Business travel as a strategic growth tool
- Actionable insights to apply to your business, including a framework for transformation success
- Examples of how digitally transforming your travel program can help solve business challenges like ROI, predictability, and duty of care

Hosted by:

Egencia



Clayton Nelson

Head of Strategy and Business Development

Egencia
