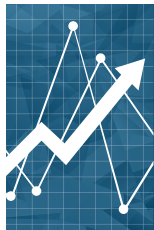


# AGENDA



NORTH AMERICAN  
FINANCE EXECUTIVE SUMMIT

## NAFES24

February 4-6, 2024 | Phoenix, AZ



**Arizona Biltmore, A Waldorf Astoria Resort**



Executive Platforms Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org)

Each participant can earn up to 12.6 credits of the 19.6 credits available.

Field of Study:

- Business Management and Organization - 11.2 credits
- Finance - 8.4 credits

**FEBRUARY 4, 2024**

3:30 pm - 4:15 pm

### Panel: Modernizing Workforce Capability Through Strategic Upskilling

- How to identify the competencies that drive value creation
- Why building a culture of collaborative innovation begins with scaling access to digital tools
- How investing in the right skills helps your team bring their best ideas to work
- Fostering the buy-in to accelerate change by enhancing workforce engagement

**McKESSON**



**Brandy Hulsey**  
VP, Accounts Payable  
& Reverse Logistics  
McKesson Corporation

**Medtronic**



**Jennifer Kirk**  
SVP, Global  
Controller and CAO  
Medtronic



**Brenda Lovcik**  
SVP & CFO  
Trex

# AGENDA

4:20 pm - 4:55 pm

## Fireside Chat: The New CFO Mandate: Building Trust in 2024

Amid the disruptions of the past few years, the office of the CFO has been at the epicenter of helping CEOs and boards manage volatile markets, geopolitical impacts, aggressive regulations, and the increasing prominence of sustainability. In unpredictable times, how do chief financial officers and their teams build trust internally with executive leadership and the board, as well as externally with investors, lenders, and other stakeholders that their organizations are on an enduring path of profitability and value creation? Join us for a lively, executive-level discussion as we share insights on how CFOs and their teams drive strategy and foster trust for the days ahead.

After this session, you will be able to:

- Define the opportunities and challenges around managing people, processes, and technology
- Discuss current market trends and their impacts
- Identify finance trends and how they are influencing priorities

**workiva**



**Steve Soter**  
VP & Industry Principal  
*Workiva, Inc.*



**Marty Vanderploeg**  
Workiva Board of Directors Chair,  
Co-Founder, and Former CEO  
*Workiva, Inc.*

5:00 pm - 6:00 pm

## Women in Finance: The ROI on Diversity in Leadership has Never Been Higher

- Creating a purpose-driven strategy that makes an impact as our organization grows and nurtures a diverse workforce
- Understanding the leader's role as a force to shape and demonstrate corporate culture, and to serve as a catalyst for equality and inclusion
- Sharing typical challenges faced by corporations when trying to promote diversity in the workforce
- Illustrating the importance of today's leaders building up and supporting the next generation our organizations will need for the future. What does that look like on a day-to-day basis?
- Offering examples of strong and effective mentorship programs in onboarding, cross-training, job shadowing, and continuing education that make the difference



**Kathleen Bonzani**  
VP, Controller & Chief  
Accounting Officer  
*Blue Cross Blue Shield*



**Stephanie Sprouse**  
CFO, Power Services  
& Renewables  
*NAES Corporation*



**Carolyn Bellisio**  
SVP & CFO  
*National Insurance  
Crime Bureau*



**Carolyn Engel**  
SVP Retail Finance  
*Nutrien*

# AGENDA

6:00 pm - 7:00 pm



6:30 pm



**FEBRUARY 5, 2024**

7:30 am - 8:15 am

**Registration and Breakfast**

8:15 am - 8:20 am

**Opening Remarks and Important Announcements**

8:20 am - 8:30 am

**Chair's Welcome Address**

*Scout*



**Chris Condon**  
*Chief Financial Officer*  
**Scout Motors**

8:30 am - 9:05 am

**Transforming and Strengthening your Finance Teams for Future Success**

- Keys to leading successful change and transformation for the future finance organization
- Aligning finance transformation to business strategy
- Winning the hearts and minds of your finance organization to support change



**Tom Dillon**  
*Chief Financial Officer,*  
*McDonalds USA*  
**McDonald's**

# AGENDA

9:05 am - 9:40 am

## Real Talk on Sustainability and Insights into Energy Transition

- Understand the increased expectation from customers and shareholders to prioritize sustainability, including clean energy investments
- Illustrate how sustainability and profitability can merge by sharing the sustainability journey of Schneider Electric
- Explore the trends, resources, and priority actions finance leaders must take to be responsible stewards of the planet and their budgets



**Joshua Dickinson**  
SVP & CFO NA  
Schneider Electric

### ROOM 1 CHAIR



**Chris Condon**  
Chief Financial Officer  
Scout Motors

### ROOM 2 CHAIR



**Tom Hood, CPA, CGMA**  
EVP – Business Engagement  
and Growth  
AICPA & CIMA

### ROOM 3 CHAIR



**Marybeth Gray**  
SVP, Health & Welfare  
Trion, a Marsh & McLennan  
Agency

9:45 am- 10:20 am

### WORKSHOP BREAKOUT ROOM 1

## Avoiding the Business “Vibecession”

*Maintaining Financial Strength and Certainty with Proactive Spend Management*

- How can negative external sentiment overcome sound business fundamentals in financial decision-making?
- Why is restructuring how organizations spend money just as important as how much, in maintaining effective spend control?
- What can financial leaders do to better control employee spend?
- How a combination of technology and effective processes and policies can work together to improve efficiencies and reduce waste.



**Adriana Carpenter**  
Chief Financial Officer  
Emburse Inc.

# AGENDA

9:45 am- 10:20 am

## WORKSHOP BREAKOUT ROOM 2

### The CFKknow: Surfing the Waves of Transformation

- What Fortune 500 CFOs are telling us, and have told us, over the years regarding their top issues & concerns
- What are the big “waves” that have occurred to business & finance and what we believe the impact will be today and in the future
- How a finance leader evaluates where the organization is in current and aspired maturation across the dimensions of a finance organization
- What comes next and predictions for the coming year+



**Tom Hood, CPA, CGMA**  
*EVP – Business Engagement and Growth*  
**AICPA & CIMA**

9:45 am- 10:20 am

## WORKSHOP BREAKOUT ROOM 3

### Fireside Chat: Architecting Durability: Balancing Profitability and Growth through Operational Excellence and Innovation with ProPetro Services and Coupa

How do you build a durable business that can not only withstand, but thrive through volatility?

- With the backdrop of uncertainty, such as changing regulations, bank failures, and geopolitical risk, compliance and risk management are priorities that finance leaders have to balance with profitability
- Learn from ProPetro Services CFO, David Schorlemer, and Coupa CFO, Kevin Burns, on how you can scale your business in a durable way with the right technology and processes that help you take advantage of movements in the market while maintaining full compliance



**Kevin Burns**  
*CFO*  
**Coupa**



**David Schorlemer**  
*CFO*  
**ProPetro Holding Corp.**

10:25 am - 12:05 am

### Pre-Arranged One-to-One Meetings

10:30 am – 10:50 am: Meeting Slot 1/Networking  
10:55 am – 11:15 am: Meeting Slot 2/Networking  
11:20 am – 11:40 am: Meeting Slot 3/Networking  
11:45 am – 12:05 pm: Meeting Slot 4/Networking

# AGENDA

12:10 pm - 12:45 pm

## BREAKOUT ROOM 1

### Finance of the Future: Moving from Reporting the Business of Yesterday to Shaping the Business of Tomorrow

Where the most critical financial resources used to be talent and money, now it's about the bigger business impact and how finance fits around the wider boardroom table. Join this session with Mars Pet Nutrition to discover:

- How the role of finance has shifted from historical reporting to forward-looking reporting, meaning a more holistic view of how it can help shape progress in areas like digitalization and sustainability
- What this change looks like at Mars Pet Nutrition through a focus on diversifying talent and skills, democratizing data and promoting value creation
- The evolving role of leadership, including Anoop's personal journey and the importance of empathy and vulnerability in building a creative and empowered team

# MARS



**Anoop Aggarwal**  
Global CFO  
Mars Pet Nutrition

12:10 pm - 12:45 pm

## BREAKOUT ROOM 2

### Keeping Up with China's Digital Retail Revolution

- How China's new digital revolution transforms how we should think about retail and digital innovation
- Looking at China's journey from 1% share of the global ecommerce market to 45%
- The power of China's digital ecosystem and the transition of e-commerce to m-commerce to today's s-commerce
- Lessons we should learn and how to close the gap

# L'ORÉAL



**Yoana Land**  
CFO Transformation  
– NA  
L'Oréal

12:10 pm - 12:45 pm

## BREAKOUT ROOM 3

### Fireside Chat: Through the Eyes of a 'Corporate Cop': Strategic Influence in Your Organization

- Exploring the intricacies of stakeholder management from a finance and accounting perspective
- Implementing a framework to assess and bridge gaps in within your organization
- Developing 'skills of the future' and effective strategies for driving change and achieving team alignment
- Navigating the complexities of risk management in a large corporation, with insights into emerging areas of importance



# AT&T



**Cassie Lee**  
SVP & Chief Audit Executive  
AT&T



# AGENDA

12:45 pm - 1:45 pm

## Themed lunch Discussions

Themed lunches are roundtable discussions on specific industry issues and challenges during lunch hour. Each roundtable will be led by a sponsor or delegate who is an expert in the field. Limited seating is available, so please sign up for your preferred topic through the event app. Choose from:

### Process Improvement: What Can Finance Teams Learn from Other Departments?

**Becker+**



**Nikki Watson Pierce**  
Director of Sales,  
Corporate Channel and  
DEI Strategic Initiatives  
*Becker*

### How Modernizing AR Can Enable CFOs to Drive Growth

**CapitalOne Trade Credit**



**Kevin Sontgerath**  
VP – B2B Payment  
Partnerships  
*Capital One Trade Credit*

### New Ideas for Controlling Costs in an Expensive World

**Copart**



**Emily Howell**  
Treasurer, Director  
of Risk  
*Copart, Inc.*

### Architecting Durability: Balancing Profitability and Growth Through Operational Excellence

**coupa**



**Kevin Burns**  
CFO  
*Coupa*

### Maximizing CapEx Budgets Effectively

**illumina®**



**Ben Roux**  
Head of Global  
Financial Services  
*Illumina*

### Navigating a Buyout Effectively

**M2S GROUP**



**Robert Beckwith**  
CFO  
*M2S Group*

### Controlling Costs in an Expensive World

**Pattern**



**Esben Pedersen**  
CFO  
*Pattern Energy*

### Succession Planning for Finance in the New Normal of Work

**SAFRAN  
FEDERAL SYSTEMS**



**James Tantalo**  
Controller  
*Safran Federal Systems*

# AGENDA

## Post-Covid Company Culture – Strategies for Sustainable Change



**Aaron Skidmore**  
VP, Chief Financial Officer  
*Sheridan Production Company*

## Future-Proofing Your Financial Consolidation: Tips & Tricks for 2024



**Dominic Sharp**  
Sr. Solution Specialist  
*Wolters Kluwer*

## Planning the Use of AI Tools to Improve Productivity

## CFOs and AI: It's Not Too Late to Get in the Game

1:45 pm - 2:20 pm

### Panel: How Finance Professionals Can Adapt Now to Working With Generative AI

- Navigating the next industrial revolution that will be driven by generative artificial intelligence
- Dispelling myths and discussing barriers that are on everyone's minds
- Exploring tools that can help your teams become more efficient, productive, and accurate in their work
- Strategies for using AI as an enabler of innovation

Moderator:



**Tom Hood, CPA, CGMA**  
EVP – Business Engagement and Growth  
*AICPA & CIMA*

Panelists:



**Rachael A. Crump**  
Chief Accounting Officer  
*Insight Enterprises, Inc.*



**Claire Bramley**  
CFO  
*Teradata Corporation*



# AGENDA

2:25 pm - 3:00 pm

## WORKSHOP BREAKOUT ROOM 1

### Forecast Healthcare Costs Accurately Using Cutting-Edge Technology!

Healthcare Costs are second to only compensation for most businesses and critical to recruiting and retaining our talent. In this session we will share:

- What the top cost drivers will be in healthcare in 2024 and beyond, and how to prepare and build a sustainable strategy to manage them.
- Our financial modeling tools will show you how to determine the RIGHT plan design changes that will deliver the greatest ROI.
- Cancer is the number one cost driver for employers in the US and we have solutions that will increase quality and drive down waste and costs.

Our presentation sessions are 100% educational and have been rated highly by conference attendees across the country.



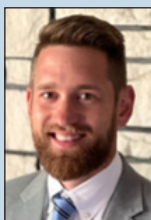
**Marybeth Gray**  
SVP, Health & Welfare  
Trion, a Marsh & McLennan Agency

2:25 pm - 3:00 pm

## WORKSHOP BREAKOUT ROOM 2

### 5 Common Mistakes Finance Teams Make When Evaluating New Software

- Delving into what it takes to choose the right tools to drive finance transformation for your organization
- Understanding how selecting your tech stack is harder than ever now that the impacts of AI and new regulations are just starting to emerge
- Strategies for conducting a successful software evaluation process including avoiding costly mistakes and optimizing your software investments to transform your finance function
- Exploring your options: Should you make the safe bet and stick with a legacy solution? Or will the latest market disrupter prove to have a lasting impact?



**Rob Konferowicz**  
Solution Advisor  
Wolters Kluwer CCH Tagetik

3:05 pm - 4:15 pm

### Pre-Arranged One-to-One Meetings

3:05 pm – 3:25 pm: Meeting Slot 5/Networking

3:30 pm – 3:50 pm: Meeting Slot 6/Networking

3:55 pm – 4:15 pm: Meeting Slot 7/Networking

# AGENDA

4:20 pm - 4:55 pm

## The Future of Work in Finance with Artificial Intelligence



**Victor Casalino**  
VP and Chief Financial  
Officer, Americas MCAPS  
**Microsoft**

4:55 pm - 5:55 pm

## Leadership Brand Equity: An Inspiring Musical Keynote on How to Build Your Personal Leadership Brand

**You can have the best business strategy in the world. An inspired culture eats strategy for lunch.”**

**—Daniel Myers**

In this multimedia presentation including four original songs, Daniel Myers will share his insights and experiences on winning through passionate inspirational leadership. You will not want to miss this experience as Daniel Myers connects organizational performance and leadership to the power of passion, using music to illustrate truths that apply to both business and life.

- How do you create an inspired and passionate culture?
- Why is passion strategically important to supply chain organizations?
- How do you identify your passions in life, and how can they inspire others?
- Discussing the four most powerful ways to inspire others
- Illustrating the difference leaders make to entire cultures



**Daniel Myers**  
Senior Fellow at Haslam School of Business  
**University of Tennessee**  
Retired EVP of Integrated Supply Chain  
**Mondelez International**

5:55 pm - 6:00 pm

## Chair's Closing Remarks



**Chris Condon**  
Chief Financial Officer  
**Scout Motors**

6:00 pm - 7:00 pm

**Drunks RECEPTION**



# AGENDA

6:30 pm



**THE Executive DINNER SERIES**

**WILL HOST AN EXECUTIVE DINNER AT MCARTHUR'S RESTAURANT & BAR (NORTH PATIO)** (EXCLUSIVE TO 25 DELEGATES AND SPEAKERS – BY INVITE ONLY)

7:00 pm



**THE Executive DINNER SERIES**

**WILL HOST AN EXECUTIVE DINNER AT MCARTHUR'S RESTAURANT & BAR (SUNROOM)** (EXCLUSIVE TO 25 DELEGATES AND SPEAKERS – BY INVITE ONLY)

**FEBRUARY 6, 2024**

7:30 am - 8:20 am

**Registration and Breakfast**

7:45 am - 8:20 am

**BREAKFAST WORKSHOP  
BREAKOUT ROOM 2**

## **Leveraging Analytics in your Pricing Strategies to Maximize Profitability**

- How companies with pricing initiatives/transformation in place beat their competitors and improve income statement performance
- How to leverage analytics to standardize contract terms, deal structures, and pricing agreements to create more consistent and favorable negotiation terms
- How to optimize discounting strategies and measure discounting performance against yourself and your competition
- How to use analytics to measure success and attribute revenue to pricing and revenue management strategies and initiatives



**Colin Carroll**  
Principal, Commercial Excellence  
PwC

# AGENDA

7:45 am - 8:20 am

**BREAKFAST  
WORKSHOP**  
**BREAKOUT  
ROOM 3**

**ORACLE®**

## Making Sense of the AI Hype in Finance

In these turbulent economic times, businesses are looking to their finance organizations to transcend being custodians of cash and serve as strategic partners. AI technologies can help finance become strategic partners, but how do you make sense of all the AI hype?

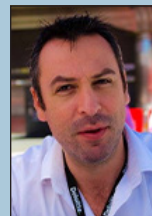
Join us to learn how finance can use AI to add value, cut costs and save time. We'll cover some of the challenges, trends and innovations that we're seeing in the FP&A office. You'll hear how Oracle Finance and others are embracing data science and AI to work faster and smarter.

You will learn:

- How to meet the demand for new skills in finance
- Ways to get past the hype to get value from AI
- The risks of not embracing AI for finance



**Tina Mashiko**  
SVP, Global Business  
Finance, Global Applications  
Oracle



**Wayne Heather**  
Executive Director, EPM  
Product Marketing  
Oracle

8:25 am - 8:35 am

## Chair's Opening Remarks

**Scout**



**Chris Condon**  
Chief Financial Officer  
Scout Motors

8:35 am - 9:10 am

## The Future of Finance: Leveraging AI to Transform Finance

- Understanding traditional AI vs. generative AI
- AI emergence across the Enterprise
- Potential AI use cases for Finance
- AI impacts on Finance talent
- Where to start with AI

**LVMH**



**Jill Pemberton**  
Chief Financial Officer, North America  
LVMH Moët Hennessy Louis Vuitton

# AGENDA

9:10 am - 9:45 am

## Sustaining an Agile and Future-Proof Corporate Strategy

- Evolving strategy to win in today's dynamic business environment.
- How a more competitive and less predictable environment is shortening the relevance and life span of many business models
- Surviving and thriving: Organizations need to be more forward-looking and agile, with greater rigor over strategic decisions
- Executing your strategy with an operational model that accelerates momentum, secures value and mitigates risk



**Mike Lenz**  
*Former EVP and Chief  
Financial Officer  
FedEx*

## ROOM 1 CHAIR



**Chris Condon**  
*Chief Financial Officer  
Scout Motors*

## ROOM 2 CHAIR



**Tom Hood, CPA, CGMA**  
*EVP – Business Engagement and Growth  
AICPA & CIMA*

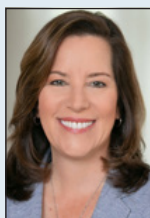
9:50 am - 10:25 am

## BREAKOUT ROOM 1

### Importance of Driving a Sustainable Cash Culture

- Cash flow from investor perspective
- Review of key cash flow generation levers and productivity metrics
- Capital allocation to support long-term growth and value creation
- Creating a sustained mindset and behavioral shift in how cash flow generation is managed
- Improved forecasting and governance to drive greater focus and discipline of cash flow management

**Johnson & Johnson**



**Amy Ellixson**  
*Head of Cash Flow  
Generation Office  
Johnson & Johnson*



# AGENDA

9:50 am - 10:25 am

## BREAKOUT ROOM 2

### Adapting to the Evolving Expectations of Investors and Shareholders

- How have investors' interests and behaviors changed in recent years, and what is driving that change
- Discussing IR's role as both a spokesperson for the company and a representative of the public's interest in the company's performance to internal decision-makers
- Building a multi-faceted strategy that thinks about how different audiences consume information and make decisions
- Establishing meaningful metrics to analyze the effectiveness of communications strategies to revise and refine over time



**Jeff Siemon**  
*VP, Investor Relations and Treasurer  
General Mills*

10:25 am - 11:15 am

### Pre-Arranged One-to-One Meetings

10:30 am – 10:50 am: Meeting Slot 8 / Networking

10:55 am – 11:15 am: Meeting Slot 9 / Networking

11:20 am - 11:55 am

## WORKSHOP BREAKOUT ROOM 1

### Navigating Market Uncertainty with AI and Data-Driven Forecasting

Danielle Marceau, Prevedere's principal economist, will discuss how to decipher today's market uncertainty and harness AI and data-driven forecasting. She will share the U.S. economic outlook for 2024, followed by how to begin incorporating this information into your forecasting and planning.

Danielle will also cover the following:

- Understanding the importance of leading external indicators in forecasting and planning
- How to identify which key external themes or trends are essential to your business and quantify the impact
- Navigating volatility and uncertain economic times by monitoring the world's data in real-time to identify change ahead of your competition

**prevedere**



**Danielle Marceau**  
*Principal Economist & Sr. Director, Analytics  
Prevedere Inc.*

# AGENDA

11:20 am - 11:55 am

## WORKSHOP BREAKOUT ROOM 2

### Preventing Payment Fraud: The New Standard in Bank Account Change Controls

Learn how new bank account change controls are being deployed to match the sophistication of fraudsters. In this session, we will share the top 10 Bank Account Change Controls from worst to most effective and the gold standard in bank account change controls.

Discover how you can empower your organization to make informed decisions, protect your operations and secure a resilient future.

- Learn how ChatGPT is used to automate business email compromise schemes.
- The latest in FBI data on payment fraud.
- Which bank account change controls should you never use
- Our recommended Layers of Protection approach to preventing fraud.

**apexanalytix.**



**Matthew Morookian**  
Director of Marketing  
*apexanalytix*

12:00 pm - 12:35 pm

## BREAKOUT ROOM 1

### Charting a New Automotive Course with Both Familiar Practices and Fresh Ideas

- Sharing insights on finding the balance of past and future: Ensuring a successful survival from start-up to sustainability when restoring an old beloved brand for an all-new electric American future
- Surviving and thriving: Preparing your organization to be more forward-looking and agile, with greater control and visibility over strategic actions
- Discussing challenges in our role as leaders in shaping and demonstrating a 'new' brand culture

**Scout**



**Chris Condon**  
Chief Financial Officer  
*Scout Motors*

12:00 pm - 12:35 pm

## BREAKOUT ROOM 2

### Fireside Chat: Preparing for a Potential Economic Slowdown

- Amid ongoing talk of a looming recession, leaders must focus in part on one major category: talent
- Facing persistent challenges when it comes to attracting, onboarding, developing, and retaining top talent
- Keeping retention as a top priority in an environment increasingly defined by remote working options
- How can leaders stay relatively flexible and focused on optimizing areas like compensation, diversity & Inclusion, training and internal development to boost employee satisfaction and prevent burnout?



**Peter Filipovic**  
VP and Treasurer  
*Starbucks*

# AGENDA

12:35 pm - 1:35 pm

Overflow Lunch Seating



## INTERACTIVE THINK TANKS

During the Day Two Lunch there will be five different 'Interactive Think Tank' topics set up.

These are informal and unmoderated networking opportunities for like-minded attendees to get together in small groups to brainstorm and discuss issues of common interest. Icebreaking questions and topics of possible conversation will be provided but are by no means mandatory.

### TOPIC 1

Technology Challenges and Opportunities Shaping the Future of Finance

### TOPIC 2

Workforce Challenges and Opportunities Shaping the Future of Finance

### TOPIC 3

Accounting Challenges and Opportunities Shaping the Future of Finance

### TOPIC 4

Finance's Role in Building the Future of Our Organizations

### TOPIC 5

Building, Representing, and Communicating Our Brand Internally and Externally

1:35 pm - 2:10 pm

### Power of Harnessing Data in Business

- Shifts over the last decade in the area of data and analytics
- Its impact on our value chain and business at large
- Typical barriers and watch outs as organizations progress on this journey



**Kimberly-Clark**



**Pallav Patni**  
CFO, North America,  
Kimberly Clark Professional  
Kimberly Clark

# AGENDA

2:10 pm - 2:45 pm

## **CFO or COO? Understanding the Evolving Role of a Finance Leader**

- Upskilling new talent: How is this different now from the last decade?
- Understanding the implications of AI and data analytics on your team development
- What is expected of finance professionals today and how can we prepare for the future of our roles?
- Developing a toolkit to support international and geographically diverse teams

**Honeywell**



***Brittany Hill***  
*CFO, Integrated  
Supply Chain, PPE  
Honeywell*

2:45 pm - 2:50 pm

## **Chair's Closing Remarks**

**Scout**



***Chris Condon***  
*Chief Financial Officer  
Scout Motors*