

NORTH AMERICAN FINANCE EXECUTIVE SUMMIT **NAFES22**

October 23-25, 2022 | Arizona Biltmore, A Waldorf Astoria Resort | Phoenix, AZ | finance-na.com

AGENDA

WELCOME DAY - OCTOBER 23, 2022

4:45 pm - 5:45 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



Jenna Anderson
VP, Treasury
& Financial
Services
W. W. Grainger, Inc



**Katerina
Dodhiba**
Divisional CFO
Smith + Nephew



Tama Bistran
Chief Accounting
Officer
Taylor Fresh Foods



Merisa Kelly
Former VP of
Finance
*Thermo Fisher
Scientific*

6:00 - 7:00 pm

Welcome Drinks Reception



6:30 pm - onwards



Simplify Operations, Spend Smarter.

**Will Host an Executive Dinner
at McArthur's North Patio**
(By Invitation Only)

DAY ONE - OCTOBER 24, 2022

7:00 - 7:45 am

Registration and Breakfast

7:45 - 7:50 am

Opening Remarks and Important Announcements

7:50 - 8:00 am

Chair's Welcome Address



Michener Chandlee
Chief Financial Officer
Fanatics Commerce

8:00 - 8:35 am

The CFO Role in the ESG Evolution:

- Sharing foundational CFO leadership principles essential to leading in times of transformation
- Demonstrating how ESG performance is a competitive advantage for Honeywell
- Discussing the Finance leaders' role in this evolution in terms of delivering on ESG, complying with ESG, and communicating the organization's ESG story
- Offering best practices to reinforce how the Finance team drives performance in ESG and other transformative areas



Greg Lewis
Senior Vice President &
Chief Financial Officer
Honeywell International

8:35 - 9:10 am

Fireside Chat: The Future of Finance in the Metaverse

- A new virtual environment for work and play is coming into being. What do senior Finance leaders need to know to prepare their organizations for success?
- Luis will discuss how today's focus in many businesses is transforming physical products into digital experiences. From Unity's perspective, he will share with the audience:
 - An overview of the Metaverse as it exists today, and as it will exist in the near future
 - Key examples of companies innovating their businesses with Unity technology - including simulation and digital twins
 - Benchmarking the opportunity the emerging virtual marketplace against other B2C disruptor technologies of the past.
 - How big a transformation might we expect, and what happens to organizations that were first-movers and late adopters to those transformations? What's the economic value that could come from it?
 - Lastly, share how digital sales via new revenue streams and value propositions is the way to grow.



Luis Felipe Visoso
Chief Financial Officer
Unity Technologies

ROOM 1 CHAIR



Michener Chandlee
Chief Financial Officer
Fanatics Commerce

ROOM 2 CHAIR



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

ROOM 3 CHAIR



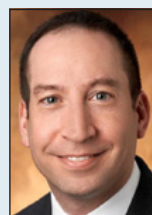
Neal Anderson
VP of Strategy,
Payments
Medius

9:15 - 9:50 am

BREAKOUT ROOM 1 TECHNOLOGY & FINANCE STRATEGY

Crisis Management is a Key Capability Under the ERM Umbrella:

- Define the core components of effective Crisis Management enabling readiness to act
- Discuss building your leadership capabilities and crisis response confidence
- Share key learnings from recent crisis management experiences
- Demonstrate the ways an agile Finance team is key to effective Crisis Management



Aaron Rosenberg
SVP, Finance,
Corporate Treasurer
Merck

9:15 - 9:50 am

**BREAKOUT
ROOM 2**
ACCOUNTING &
REVENUE

Driving Investments in Growth through Spend Rationalization

- How to free up cash to invest in the growth drivers for your business
- Defining an outcome and establishing appropriate targets
- Develop a process that will drive results across your organization and allow you to make the best decisions for your business
- How to surface the challenges that occur during the process and how to address them
- Establish a culture of continuous change to ensure you have the resources you need for future growth



Sharon Schuler
SVP, Financial Planning and Analysis
BJ's Wholesale Club, Inc

9:55 - 11:35 am

Pre-Arranged One-to-One Meetings

10:00 am – 10:20 am: Meeting Slot 1/Networking
10:25 am – 10:45 am: Meeting Slot 2/Networking
10:50 am – 11:10 am: Meeting Slot 3/Networking
11:15 am – 11:35 am: Meeting Slot 4/Networking

11:40 am- 12:15 pm

**WORKSHOP
BREAKOUT
ROOM 1**

Maximizing Financial Resilience in the Face of a Downturn

- Outlining what steps teams need to take before a financial crisis hits, to shore up defenses and minimize its impact on their organization
- Explaining which technology investments will deliver the greatest impact in an uncertain economy
- Delivering insight into why finance leaders should embrace artificial intelligence and machine learning to support their teams' decision making
- Explaining the mindset required to advocate for change in a challenging environment



Adriana Carpenter
Chief Financial Officer
Emburse

11:40 am - 12:15 pm

**WORKSHOP
BREAKOUT
ROOM 2**

The Future of Finance is About the People Who Can Ride the Waves of Transformation

- Exploring how CFOs and other finance professionals are leveraging digital tools as part of their growing role as strategic partners in their organization's strategic decision-making
- How does upskilling of technical skills fit into the larger conversation of skills development in the context of a finance maturity model?
- Offering ideas and innovations to help finance leaders gain comfort and confidence with the new tools and capabilities at their disposal while also looking to the future of these accelerating trends
- Understanding how the increasing role of technology in our profession shapes different generations of our executives, and what we should do individually and as a community to allow a rising tide to lift all boats as we undergo this transformation together



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

11:40 am - 12:15 pm

**WORKSHOP
BREAKOUT
ROOM 3**

Fireside Chat: The Three Ways That VF Corporation Unlocked Working Capital and Increased Agility

Reduce costs and improve margins, improve agility and productivity, mitigate risk and optimize performance: these are the top priorities for CFOs and finance leaders across every industry. When VF Corporation started their Business Spend Management (BSM) journey in 2015, they found a global partner who could help them tackle these challenges and more. As a result, VF was able to:

- Maximize their spend under management, gain better visibility into working capital and optimize cash flow
- Standardize procurement processes across their global entities
- Unlock data and analytics available in their ERP

Hear from VF Corporation CFO, Matt Puckett, and Coupa CFO, Tony Tiscornia, about their experience transforming their spend management practices to unlock value and increase agility. We'll also discuss how they went about changing the spend culture at VF and lessons learned along the way.



Matt Puckett
EVP and CFO
VF Corporation



Tony Tiscornia
CFO
Coupa Software

12:20 - 12:55 pm

Fireside Chat: Finance Talent in an Age of Upheaval

- Identifying, attracting, developing, and retaining top talent has always been challenging, and things have only become more complicated during the pandemic and as more and more people embrace new ways of working. What are we doing differently to understand our people's wants and needs, support them in their personal and professional lives, and lead them effectively and productively in the new business realities we all face?
- Exploring how technology is changing both how we work and how we communicate, coordinate, and collaborate work. Where is this trend going in Finance, and what should we as leaders be doing to stay abreast of current developments while working to get ahead of the curve?
- Debating whether things will ever get 'back to normal,' and what that means for our culture. Is there an opportunity here to embrace change as a catalyst for who we want to be as Finance professionals?



Yvonne McGill
SVP and Corporate Controller
Dell Technologies

12:55 - 1:55 pm

LUNCH-AND-LEARN ROUNDTABLE 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:

Growing Diversity in Accounting & Finance

Becker+



Nikki Watson Pierce
Director of Sales,
Corporate Channel
Becker

Accounting Treatment for Supplier Financing and Corporate Credit Card Liability

DIAGEO



Rob Santo
Director
Financial
Services
Diageo NA

Modernization and Automation of the Finance Function



April Murray
CFO
Entekra LLC/ Subsidiary
of Louisiana-Pacific
Corporation

Ideas and Innovations to Attract and Retain Top Talent



Vanessa Blumer
VP FP&A
Liberty Utilities

Automating Invoicing and the Journey to Paperless Finance



Neal Anderson
VP of Strategy,
Payments
Medius

How technology has changed the approach to Planning & Budgeting



Len Nicholson
Sr. Director-
Business Services
Moultre Farms-
Delaware

Realizing Value from Our IT Function and IT Spend



Derrick Walker
Finance Manager –
Technology Process &
Reporting
Nike Inc

Organizing for Success: Centralization of Strategic Planning, Decision Making and Reporting



Roy Schwalm
SVP Finance & Strategy
RE/MAX Holdings

Guiding Private Corporations through Merger and Acquisition Activities



Lowell Mora
CFO
UCC Environmental

1:55 - 2:30 pm

The Power of the Portfolio

- VF Corporation owns and manages a highly intentional portfolio of active-lifestyle brands in the areas of outdoor, active, workwear and streetwear, with each brand playing a specific role.
- VF actively manages its portfolio with a systematic approach to evaluating strategic, ownership and financial parameters.
- The company's globally integrated business backbone and strategic capabilities support consistent, sustainable and profitable growth across its brand portfolio.
- Operating model choices drive speed and agility while at the same time ensuring scale and leverage.



Matt Puckett
EVP and CFO
VF Corporation

ROOM 1 CHAIR



Michener Chandlee
Chief Financial Officer
Fanatics Commerce

ROOM 2 CHAIR



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

ROOM 3 CHAIR



Neal Anderson
VP of Strategy, Payments
Medius

2:35 pm - 3:10 pm

CFO Perspective on Healthcare Costs – Insights from CFO Survey Shows a Shift in Thinking About Healthcare Costs

Between shifting labor markets, persistent global complications relating to COVID-19, the Russia-Ukraine Crisis, high inflation and other unprecedented economic challenges, employers have had their hands full in 2022. Many are strategizing to attract and retain the workforce they need while navigating today's business challenges. In this presentation, we will share CFOs perspectives on the business impact rising healthcare costs will have on your business and insight on what is to come. Having a good solid strategy on healthcare costs is no longer an option.

**WORKSHOP
BREAKOUT
ROOM 1**



Marybeth Gray
SVP Health & Welfare Consulting
Trion Group, a Marsh & McLennan Agency, LLC

2:35 pm - 3:10 pm

**WORKSHOP
BREAKOUT
ROOM 2**

Achieving Intelligent Financial Planning & Analysis Transformation – Smarter Planning, Actionable Insights & Better Outcomes

The FP&A Maturity Model is based on research conducted by FP&A Trends Group and sponsored by Board International, based on interviews with approximately 3,870 senior finance practitioners and thought leaders from around the globe. It allows organizations of any size, industry, and geography to assess where they are in terms of achieving maturity in managing some of the business decisions such as risk, uncertainty, forecasting, modeling, and analyzing various other business trends, based on leadership directives, functional skills, business partner and collaboration, FP&A process, data and analytics, and Technology. Join us to learn about:

- How the maturity level within each category will help you understand and create an intelligent transformation strategy
- How to optimize your available resources – people, process and technology
- Where your FP&A team ranks in its confidence index and how you can develop and implement an effective business planning process



Jeff Miller
Solutions Architect
Board Americas

2:35 pm - 3:10 pm

**WORKSHOP
BREAKOUT
ROOM 3**

Top Finance Priorities for 2023

Accounting and Finance teams have undergone significant changes in the past few years. The ability to be flexible and adapt to continuous change in these times of uncertainty will be paramount for companies to remain successful in the current unprecedented economic environment. Join us to understand current challenges and how teams are adapting and moving forward.

- Define the opportunities and challenges around people, processes, and technology
- Identify current finance trends and how they are impacting priorities
- Discuss current market trends and their impact on the organization



Josh Gertsch
Industry Principal
Workiva



Cheryl Levesque
Partner
FORVIS

3:15 - 4:25 pm

Pre-Arranged One-to-One Meetings

3:15 pm – 3:35 pm: Meeting Slot 5 / Networking

3:40 pm – 4:00 pm: Meeting Slot 6 / Networking

4:05 pm – 4:25 pm: Meeting Slot 7 / Networking

4:30 - 5:05 pm

Panel: Transformation of the Finance Function

- How is the role of the Finance leader and the Finance team changing within organizations today, and what is driving that change?
- Discussing the Finance executive as a major contributor to value creation. How do we generate competitive advantage and support all facets of the business to succeed?
- Comparing and contrasting different ways we can bring value partnering to our companies. What should we keep in mind as we choose the methodology that will work best for us?
- Talking about the ongoing struggle to identify, attract, develop, and retain talent



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



Claire Bramley
*CFO
Teradata*



Chris Kite
*Director, WW Strategy and
Operations
Amazon Web Services (AWS)*

5:05 - 6:00 pm

Live Interactive Musical Keynote: Creating a Passionate and Inspired Culture to Win

“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 and manufacturing 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*



Philip Myers
*Singer-Songwriter
and Recording Artist*



Natalie Murphy
*Award-Winning Country Fiddle Player,
Singer-Songwriter and Recording Artist*

6:00 - 6:05 pm

Chair's Closing Remarks



Michener Chandlee
Chief Financial Officer
Fanatics Commerce

6:05 - 7:00 pm



6:05 - 7:00 pm

Bourbon Station

Sponsored By:



6:30 pm - onwards



Will Host an Executive Dinner
at McArthur's Sunroom
(By Invitation Only)

7:00 pm - onwards



Will Host an Executive Dinner
at McArthur's North Patio
(By Invitation Only)

DAY TWO - OCTOBER 25, 2022

6:20 - 8:20 am

Goat Yoga Registration (open to delegates and speakers who have preregistered)

6:30 - 7:15 am

Goat Yoga

Co-Sponsored By:



7:30 - 8:20 am

Registration and Breakfast

7:45 - 8:20 am

How and Why You Should Capitalize on Artificial Intelligence

- The power of prediction: understanding the purpose of finance automation and how it can dramatically improve operating efficiencies
- How can AI interact with other technologies to create new opportunities?
- Revealing why so many Digital Transformations projects fail, and how to avoid those common pitfalls
- Reviewing top use cases from global finance organizations who are seeing strong outcomes and high ROI with automation
- Is your workforce ready? What will be the impact on employee engagement and morale in the long run?

**BREAKFAST
WORKSHOP
BREAKOUT
ROOM 2**



Tammy Lindorf
Director Shared Services
Martin Marietta

7:45 - 8:20 am

Finance transformation and the upskilling imperative

- Finance leaders are accelerating their function's transformation into digital organizations. Predictive modeling and scenario analysis are becoming far more common and critical.
- Data analytics, AI, and automation are being employed more and more broadly to drive standardization and eliminate manual processes.
- Part of this transformation is attracting and retaining talent with the right skills to employ these mission-critical technologies.

**BREAKFAST
WORKSHOP
BREAKOUT
ROOM 3**



Kevin Kroen
Partner, Intelligent Automation
and Digital Upskilling
PwC

8:25 - 8:35 am

Chair's Opening Remarks



Michener Chandlee
Chief Financial Officer
Fanatics Commerce

8:35 - 9:10 am

Fireside Chat: Fanatics Finance and the Dynamic and Ever-Changing World of Business in Sport

- Offering insights into Fanatics which powers eCommerce for 900+ leagues, teams, colleges and other partners globally
- How does Fanatics deliver on representing a house of brands including Nike (for the NFL, MLB, and key NCAA institutions), Mitchell & Ness, Wincraft, Top Of the World, and Majestic, serving fandom around the world?
- Demonstrating the role Finance plays as a catalyst for transformational change
- Execution in a complex and dynamic environment: What works best, how is that changing, and what should we do as finance professionals to stay ahead of the curve?



Michener Chandlee
Chief Financial Officer
Fanatics Commerce

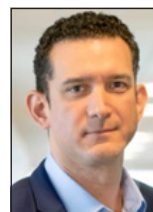


Tom Hood, CPA, CGMA
*EVP – Business Engagement
and Growth*
AICPA-CIMA

9:10 - 9:45 am

Guiding the Finance Team and the Enterprise at Large Through M&A Activities

- Walking through a timeline of the who, what, where, when, why, and how of bringing two different companies together in a productive and compliant way
- Building bridges to the other Finance team to allow two-way communication, coordination, and collaboration as the two parties come together
- Discussing common obstacles and stumbling blocks in M&A activity. What can be done to avoid these pitfalls?
- Illustrating best practices, lessons learned, and key takeaways based on Mars' experience acquiring KIND North America. Where are we as a Finance team and as a company today on the far side of this union?



Dumitrache Martinez
Global CFO, Kind & Nature's Bakery
Mars

9:50 - 10:25 am

**BREAKOUT
ROOM 1**
TECHNOLOGY
& FINANCE
STRATEGY

Evolving Your Business & Diversifying Revenue

- The importance of identifying your business super-power
- Investing before times get tough
- The efficient way to unlock omnichannel revenue
- Practice discipline...pace yourself and your business leaders
- The finance leads role in identifying, executing and growing the business

NBCUniversal



Jared DiPalma
CFO, News Group
NBCUniversal

9:50 - 10:25 am

**BREAKOUT
ROOM 2**
ACCOUNTING &
REVENUE

Raising Capital & Growing Organic Revenue

- Building and communicating a concise company narrative to effectively raise capital and secure financing
- Creating organic new platforms to generate revenue
- Identifying potential partners and curating targets to optimize raising funds
- Discuss tools and techniques for navigating macro-economic and business specific challenges during fund-raising campaigns
- Prioritizing investment dollars ahead of full-scale financing

GE Lighting
A SAVANT COMPANY



Royal Simmons
EVP and CFO
GE Lighting, a Savant company

10:25 - 11:30 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

10:45 - 11:15 am

INTERACTIVE THING TANKS



INTERACTIVE THING TANKS

During the Day Two Morning Networking Break there will be three different 'Interactive Thing Tank' areas set up in the Exhibition Hall. 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

11:35 am - 12:10 pm

**WORKSHOP
BREAKOUT
ROOM 1**

Navigating Market Volatility and Uncertainty with Predictive Planning

The world is changing faster and with more volatility than ever before. On top of the pandemic, business leaders must now be prepared to navigate inflationary uncertainty, recessionary pressures, rising geopolitical tensions, and more. With millions of dollars at stake, businesses must adapt their forecasting methods to incorporate these external factors, or risk being blindsided by changing market conditions. Find your path forward amidst the volatility with the combination of global macroeconomic data, market-validated forecasts, and “what-if” scenarios.

In this session, you will learn how to:

- Quantify the impact of these economic factors, and more, on your future performance
- Identify the most relevant indicators to your business with lead and lag times
- Leverage global data and predictive planning to uncover real-time insights on changing economic conditions and inform data-driven decisions

prevedere



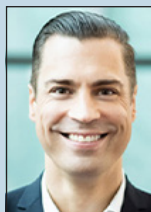
Danielle Marceau
Principal Economist & Director of Analytics
Prevedere Inc.

11:35 am - 12:10 pm

**WORKSHOP
BREAKOUT
ROOM 2**

Fireside Chat: How Finance Leaders Leverage Hyperautomation for Touchless AP Processing

- Learn where to focus your hyperautomation efforts for fast time-to-value
- Understand the anatomy & value of a hyperautomated AP process
- See the benefits from real customer examples



Martti Nurminen
CFO
Basware



Ravit Gutman
Managing Partner & Solution Architect
Extropy

11:35 am - 12:10 pm

**WORKSHOP
BREAKOUT
ROOM 3**

How Finance Teams can Drive Strategic Insights and Operational Agility with Data Analytics

- Build a Robust Data Driven Financial Framework: Leverage data analytics to improve financial visibility, forecast accuracy and operational discipline.
- Be Agile & Innovative: Realtime detection of business disruption and risk, innovate to drive operational improvements and strategic growth opportunities.
- Drive Strategic Contributions: Use data insights to enhance decision making and optimize return on investments.

teradata.



Claire Bramley
CFO
Teradata

9:15 - 9:50 am

**BREAKOUT
ROOM 1**
TECHNOLOGY
& FINANCE
STRATEGY

Case Study: Procter & Gamble's Acquisition of Gillette Co. — Strategic Rationale and Key Learnings

- Walking through the strategic rationale for Procter & Gamble's \$57-billion acquisition of Gillette Co. in 2005
- Reviewing how we integrated Gillette into P&G and the key learnings -- with lessons all companies can apply in their M&A work
- Discussing the critical role P&G's Finance Team played in integrating Gillette while maintaining momentum on both businesses



Gordon Wright
*SVP, Corporate Finance
(Retired)
Procter & Gamble*

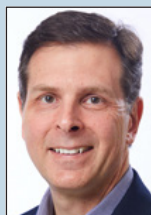
12:15 - 12:50 pm

**BREAKOUT
ROOM 2**
ACCOUNTING &
REVENUE

Transformation in the COVID Era

An exploration of Claire's business transformation and the Finance Team's transformation

- Business/Environmental Backdrop
- Claire's Transformation Journey
- Finance's Parallel Transformation
- Lessons Learned



Michael Schwindle
*CFO
Claire's*

12:55 - 1:55 pm

Networking Lunch

1:55 - 2:30 pm

The Evolving Role of the Finance Executive in Shaping an Organization's Future

- Discussing my experiences at GM and ADM as an active participant in the evolution of Finance executives within Corporate America
- Exploring how ADM built up its Finance organization with a three-legged stool model of Corporate Finance, BU Finance, and GBS Finance
- Demonstrating the importance of agility and flexibility, and how finance roles change depending on circumstances
- Focusing on talent development, team motivation, and retention. What is our approach towards "MBWA"?



Ray Young
*Vice Chairman
Former Chief Financial Officer
Archer Daniels Midland*

2:30 - 3:05 pm

Fireside Chat: Master Data Process Efficiency Driving Cash Flow

Connecting the dots:

- Master data
- Balance sheet
- Cash flow



Tom O'Connell
VP and Controller Latin America
Ecolab

3:05 - 3:15 pm

Chair's Closing Remarks



Neal Anderson
VP of Strategy, Payments
Medius