

# New Agenda Template

## FORUM OPENS

---

**November 16, 2022**

**8:30 am-9:00 am**

### **Registration & Breakfast**

Morning registration & name-badge collection, then grab some breakfast & coffee/tea.

## STAGE 1

---

**November 16, 2022**

**9:00 am-9:30 am**

### **CFO's must be generalists, not specialists**

Mitesh Popat, CFO, Global Equities Sales & Trading

Mitesh Popat, CFO, Global Equities Sales and Trading, Citi

Talent with backgrounds in Communications, Sales, Trading, Engineering, Risk Management, Data Science? Yes, we need to equip the evolving CFO leaderships with talent beyond conventional accounting, economics and business backgrounds. Today's CFO is a generalist, not a specialist, leading charge of shaping and executing strategy working closely with the CEO and the Board.

## COFFEE BREAK

---

**November 16, 2022**

**10:30 am-11:00 am**

## STAGE 1

---

**November 16, 2022**

**11:00 am-11:30 am**

## **How Can CFOs Curb Health Plan Costs without Sacrificing Care?**

Jason Hamelin, VP, Finance

Stephen Decker, VP & GC

Jason Hamelin, VP, Finance, TÜV SÜD

Stephen Decker, VP & GC, DOW Technologies

Employer health plan costs continue to rise and challenge the budget of almost every business. During this session, hear from two leaders who helped turn this trend around for their companies. You'll learn what CFOs can do to tackle their own healthcare cost challenges, without sacrificing the care their employees receive.

**STAGE 2**

---

**November 16, 2022**

**11:00 am-11:30 am**

## **Planning and Preparing for Major External Factors with Global Data and Predictive AI**

Danielle Marceau, Director, Analytics

Danielle Marceau, Director of Analytics, Prevedere

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, unprecedented labor market imbalance, and global supply chain disruption. With millions of dollars at stake, now is not the time to simply ignore these external factors and hope they go away. Find your path forward amidst the volatility with the combination of global macroeconomic data, econometric prediction modeling, and market-validated forecasts and scenarios.

**STAGE 3**

---

**November 16, 2022**

**11:00 am-11:30 am**

## **Hands on Crypto - A practitioner's journey in the crypto ecosystem**

Kinga Bosse, CFO

Kinga Bosse, CFO, Lukka

This session describes Lukka's CFOs approach to some of the key intricacies of the crypto ecosystem and the company's approach to entering the world of crypto commerce first holding crypto assets on their balance sheet and later accepting crypto currencies for payments.

REMOVE ME

---

November 16, 2022

-

STAGE 1

---

November 16, 2022

11:30 am-12:00 pm

## How Can CFOs Curb Health Plan Costs without Sacrificing Care?

Jason Hamelin, VP, Finance

Jason Hamelin, VP, Finance, TÜV SÜD  
Stephen Decker, VP & GC, DOW Technologies

Employer health plan costs continue to rise and challenge the budget of almost every business. During this session, hear from two leaders who helped turn this trend around for their companies. You'll learn what CFOs can do to tackle their own healthcare cost challenges, without sacrificing the care their employees receive.

STAGE 2

---

November 16, 2022

11:30 am-12:00 pm

## How Can CFOs Curb Health Plan Costs without Sacrificing Care?

Stephen Decker, VP & GC

Jason Hamelin, VP, Finance, TÜV SÜD  
Stephen Decker, VP & GC, DOW Technologies

Employer health plan costs continue to rise and challenge the budget of almost every business. During this session, hear from two leaders who helped turn this trend around for their companies. You'll learn what CFOs can do to tackle their own healthcare cost challenges, without sacrificing the care their employees receive.

## STAGE 3

---

November 16, 2022

11:30 am-12:00 pm

### How Can CFOs Curb Health Plan Costs without Sacrificing Care?

Stephen Decker, VP & GC

Jason Hamelin, VP, Finance

Jason Hamelin, VP, Finance, TÜV SÜD  
Stephen Decker, VP & GC, DOW Technologies

Employer health plan costs continue to rise and challenge the budget of almost every business. During this session, hear from two leaders who helped turn this trend around for their companies. You'll learn what CFOs can do to tackle their own healthcare cost challenges, without sacrificing the care their employees receive.

## LUNCH

---

November 16, 2022

12:00 pm-1:00 pm

## STAGE 1

---

November 16, 2022

1:00 pm-1:30 pm

### Weathering the "Great Resignation" - Secure, Strengthen & Retain Finance Talent

Josh Gertsch, Principal, Accounting & Finance

Josh Gertsch, Director, Product Marketing, Workiva

As we begin a new year, CFOs and their teams must overcome unforeseen challenges and focus on implementing new strategies for organizational success. Talent is fast becoming a key aspect of profitability and maintaining a competitive edge.

Attend this session to learn how your organization can retain and attract the right finance team as the "Great Resignation" sweeps the nation.

This session will explore:

How to recruit, retain, and engage finance talent during the "Great Resignation"

The need for digital transformation and new technology investments

Ways to overcome the unprecedented talent crisis and strengthen your finance team

## STAGE 2

November 16, 2022

1:00 pm-1:30 pm

### The SaaS vortex: Master your software spend in 2022

Andy Smith, Director of Sales

Jake Holt, Enterprise Sales Manager

Andy Smith, Director of Sales, Vendr

Jake Holt, Enterprise Sales Manager, Vendr

SaaS negotiations can feel a lot like the wild wild west. With highly variable pricing, it's challenging to maintain control in a negotiation or even know if the commercials you're getting are fair. Join a conversation with Vendr's SaaS buying experts Andy Smith and Jake Holt to understand how finance teams at high-growth companies save millions on software.

You'll learn how Vendr works along with tips and best practices that we've seen work across thousands of SaaS negotiations with suppliers like Snowflake, Salesforce, and more.

## FORUM OPENS

November 17, 2022

8:30 am-9:00 am

### Registration & Breakfast

Morning registration & name-badge collection, then grab some breakfast & coffee/tea.

## STAGE 1

November 17, 2022

9:00 am-9:30 am

### Transforming Accounting and Finance into Business Partners with Automation and Process Re-Engineering.

Mary Beth Ottley, Previously CFO , East West Hospitality

Mary Beth Ottley, CFO, East West Hospitality

Using technical tools like AP WorkFlow/Automation and Business Intelligence, the finance and accounting teams begin to add more value by understanding the business and what drives efficiency and productivity. The collaboration between the finance/accounting team and operational teams creates an environment of support and effectiveness. We use tools and outside resources to assist us in identifying gaps between the expectations of operations and the daily tasks and processes provided by the support departments.

This transforms the support team from traditional data entry clerks and spreadsheet creators to analysts that can use their time to identify value streams and work directly with the operational stakeholders to improve efficiency.

The result is hiring and retaining quality employees and creating an environment where they can expand their knowledge through technical tools, business processes and operational workflow expertise.