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# 30th ONE STOP UPDATE for the Accountant in Business™

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SPRING SERIES

7 & 8 November 2011, Te Papa, Wellington | 15 & 16 November 2011, Crowne Plaza, Auckland



Pushing the Boundaries of Finance while Navigating Through Adversity

## Featuring Keynote Presentations From:



Craig Richardson  
CEO, Jade Software



Janine Smith,  
Director, The Warehouse Group  
& Kordia, Chairman, McLaren's  
Young New Zealand



Peter Floris,  
CFO,  
The New Zealand Merino  
Company



Irene Van Dyk,  
Silver Fern

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# 30th ONE STOP UPDATE for the Accountant in Business™

SPRING SERIES

## A WORD FROM THE CONFERENCE CHAIR



The theme of the November One Stop Update for the Accountant in Business is "Pushing the Boundaries of Finance While Navigating through Adversity". We recognise that our on-going natural disasters have created a sense that we are living with unpredictability bordering on the precarious. Combined with shifting global and local market demands and the slow recovery of businesses and economies worldwide it is clear that now is a crucial time requiring inspirational business leadership.

This two-day conference recognises that a finance team is key in planning for contingency and in steering an organisation through uncertainty. You will hear from leaders who have been brilliant at the helm and learn from case studies which demonstrate how to navigate effectively through the shoals of adversity while generating competitive advantage.

The conference continues to offer you comprehensive One Stop Updates on key finance and technical accounting topics as well as practical tools and techniques which can serve as your compass in steering your organisation through.

I look forward to meeting you in November.

Mark Hucklesby  
National Technical Director, GRANT THORNTON



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- Prize not redeemable for cash
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- Prize draw will be made on the day of the event.
- Participants must be present to redeem their prize

### Craig Richardson



Craig Richardson joined Jade Software as CEO in 2009. Prior to Jade, he was CFO for the Pacific Operations of ASX listed companies Coca-Cola Amatil and BlueScope Steel (including New Zealand Steel). Craig has also held senior executive roles in

finance, strategy, planning and operation with Vodafone Australia, Vodafone Sweden, SingTel Optus and BHP.

Craig completed his degree in Commerce at the University of Tasmania in Hobart, Australia. He has an MBA from Deakin University, is a fellow of CPA Australia and has attended the MIT Sloan School of Management.

Craig is a Director of Jade Software Corporation and subsidiaries. He is Chairman of Outsmart Limited, creator of new generation virtual world Smallworlds. He is also an independent Director of ultra-fast broadband company Enable Networks.

### Peter Floris



Peter Floris is the CFO of The New Zealand Merino Company Limited and was a finalist for the 2011 CFO of the Year Award.

Peter has overseen the transition of The New Zealand Merino Company from a \$5 million per annum levy organisation to a fully commercial organisation with annual revenues in excess of \$120 million. The New Zealand Merino Company is now an integrated marketer and seller of New Zealand merino wool into high-end apparel markets, and is a leader in the differentiation and the de-commoditisation of the New Zealand primary products. In addition to the finance function, Peter also has the responsibility for strategy, business development, sustainability and human resources.

Prior to joining The New Zealand Merino Company Peter held senior finance roles with Panmure Gordon and Company, a London stockbroker and investment bank, and Trust Bank Canterbury. Peter grew up in Christchurch and holds a Bachelor of Commerce degree and an MBA from the University of Canterbury.

KEYNOTES



## CONFERENCE AGENDA

### DAY ONE

8.30 Registration and coffee

#### 9.00 **Opening remarks from the Chair**

**Mark Hucklesby**, National Technical Director, Grant Thornton

#### 9.05 **Keynote CEO Address: Providing inspirational leadership to navigate through adverse events**



A company's ability to navigate complexity, unpredictability, and shifting global and local market demands is determining the success of businesses worldwide. A leader's ability to navigate through adverse events such as those that have plagued Christchurch sets apart a business from the rest in this highly competitive environment. Craig will share with you aspects on how he and Jade Software have successfully been navigating through this new economic environment

- What are the right leadership skills for the new economic environment?
- The impact that Christchurch has had on Jade's business environment
- Creating a corporate culture that inherently generates real, sustainable competitive advantage.

**Craig Richardson**, CEO, Jade Software

#### 9.45 **Case Study: Adecco New Zealand Project Initiative**

Transforming the finance function to provide increased added value is one of the ways that Adecco earned a place as a finalist at the CFO Awards 2011. Adecco New Zealand put together key initiatives that made an impact on their organisation.

- Enhanced reporting for clearer communication
- Communicating to the organisation

**Emilie Grillo**, Country Finance Manager, Adecco New Zealand

10.30 Morning tea

#### 10.50 **The One Stop Update on Tax**

The team from Deloitte will provide you with a practical update on the key tax developments in the last twelve months. Topics include:

- The tax policies of the major political parties in the run up to the election and what this means for you and your business.
- The very latest on this year's tax cases, plus where the tax avoidance boundary lies following the Supreme Court decision in Penny & Hooper
- The latest rulings and policy developments that you need to know
- Employee allowances are under review again, so what does this mean for you?
- What is the cost of the latest KiwiSaver changes for your business?
- Tax governance and risk management – the control features a business should have
- GST update, including the operational issues with the new zero rating of commercial land provisions and the new GST apportionment regime

**In Auckland:**

**Annalie Hampton**, Partner, **Allan Bullot**, Partner, **Bill Hale**, Partner, Deloitte

**In Wellington:**

**Andrew Babbage**, Partner, **Allan Bullot**, Partner, **Ian Fay**, Client Service Director, Deloitte

#### 12.10 **Keynote CFO Address: Overcoming challenges in the wool industry**

In any economic environment, it is critical for companies to create and maintain competitive advantages in order to attract customers and create lasting value. The New Zealand Merino Company is now an integrated marketer and seller of New Zealand merino wool into high-end apparel markets, and is a leader in the differentiation and the de-commoditisation of New Zealand primary products. This keynote address will cover the strategies that The New Zealand Merino Company has used to bring about its success. Peter will draw on his experience to discuss what it takes to create a corporate culture that inherently generates real, sustainable competitive advantage.

**Peter Floris**, CFO, The New Zealand Merino Company

1.00 Lunch

## BREAKOUT STREAMS

### Management/Business Stream

#### 1.50 **Case study: Transforming the finance function to add value through lean accounting**

This session will focus on lean practices so your organisation can become more cost effective as well as focusing on influencing organisation performance in order to contribute to the bottom line. Transforming the accounting function to add value - regaining relevance and becoming more the score keeper and take on the role of the strategic business partner.

- Lean accounting - what's it all about
- Case study - real-time information flow
- Regaining relevance - adding value leading to improved effectiveness

**Craig Green**, *Business Controller, ABB*

#### 2.40 **Speaking like a CEO: Keys to commanding attention and getting results**

To become successful, hard work and experience are vital, but they can only take you so far. To lead in an industry you must be ready to take on a more vocal role.

- Developing a compelling speaking style
- This tools you need to take your leadership to the next level
- The ability to take your audience with you
- Story telling and the use of examples makes messages come alive

**Janine Gould**, *Consultant, Communicate*

3.30 Afternoon tea

#### 3.50 **One Stop Update on Treasury & FX Risk Management**

Global uncertainties due to currency fluctuations means that controlled FX Risk management is still crucial

- Review and outlook of global currency market for the next 6-12 months
- Outlook for NZ dollar against global currencies
- Outlook for commodities
- What are the general risks and trends ahead?

**Mike Houlahan**, *Director, Tuatara Management*

#### 4.35 **From accountant to global software entrepreneur: The strategies to get there**

To make the shift from accountant to global software entrepreneur requires the confidence to provide strategic direction. Making the shift with your current skill set is not always a given. During this session you will here the Xero story as well as the insights necessary for you to add strategic value to your organisation

- Key attributes you need to become an entrepreneur
- The skill set you have as an accountant that helps you to lead and grow a business
- Growing a global team

**Hamish Edwards**, *Co-Founder, Xero*

5.15 End of day one

### Technical Stream

#### **Effectively predicting and preparing the organisation for the future through forecasting and financial modelling**

It is common knowledge that financial modeling is a powerful tool for improving and measuring business performance. In the wake of the GFC, financial forecasting is now seen as a "must have" for both business operators and external parties.

- Creating a model that best meets the needs of the organisation as opposed to 'best practice'.
- The different approaches to forecasting and modeling
- Understanding your business drivers to prepare your financial forecast

**Todd Wilkin**, *Senior Manager Forecasting & Planning, Westpac Banking Corporation*

#### **One Stop Update on Accounting Standards and IFRS**

The world of accounting standards is continually changing. At this session, you will hear about:

- Recent standards and exposure drafts
- Other developments in the pipeline

**In Auckland:**  
**Kimberley Crook**, *Partner*, **David Pacey**, *Executive Director*, **Ernst & Young**  
**In Wellington:**  
**Kimberley Crook**, *Partner*, **Ravi Kumar**, *Senior Manager*, **Ernst & Young**

#### **Leasing exposure draft update**

The leasing exposure draft brings in significant changes for entities when accounting for assets in the statement of financial position. This session gives the breakdown of the Exposure Draft and examines what it will imply for your organization.

- Implications for lessees with operating leases
- Implications for lessees with finance leases
- Implications for lessors
- What you need to do to prepare for the changes ahead

**In Auckland:**  
**Mariann Trieber**, *Manager*, **PricewaterhouseCoopers**  
**In Wellington:**  
**Clive Brodie**, *Senior Manager*, **PricewaterhouseCoopers**

#### **A roadmap to fraud prevention**

The 21st century global economy may have opened up new markets and cheaper sources of supply, but it has also exposed companies to greater risks of fraud. This session focuses on the latest insight into fraud risk management affiliated with financial statement fraud, asset misappropriation, and corruption.

- Types of corporate fraud
- Measures to prevent fraud
- How to detect fraud
- Conducting an investigation

**In Auckland:**  
**Nick Paterson**, *GM*, **Fraud & Corruption**, **Serious Fraud Office**  
**In Wellington:**  
**Adam Feeley**, *Director*, **Serious Fraud Office**



# 30th ONE STOP UPDATE for the Accountant in Business™

SUMMER SERIES

DAY TWO

## Management/Business Stream

## Technical Stream

9.00 **Generating an effective business case**  
As budgets are tightened, generating an effective business case has never been more important. Financial professionals must be able to stand by their analysis to ensure projects produce real and measurable ROI's.

- What the CFO's and board are looking for in a business case
- Identifying key business needs
- Measuring ROI – quantifiable and unquantifiable characteristics

**Hamish Stevens**, *Director, Business Governance and Advisory*

OR

**Tools for managing risk**  
Today's economic outlook is as complex and dynamic as we have ever seen. To be successful organisations must determine its risk appetite in order to make sound decisions and reflect good performance management.

- Defining a risk appetite framework
- Getting stakeholders engaged so the risk appetite statement is relevant to the organization
- How to capture data to assess performance against the organisation's risk appetite

**Jeremy Bendall**, *Managing Director, Bendall Advisory*

9.50 **Stop letting stress rule you**  
You are a skilled accountant that can manage the big picture and pay attention to detail, right? Learn how to apply those same skills to help you simply surviving and thriving. Examine how to cope with deadlines, the ebb-and-flow or pressure and shifts in your workload.

- Learn why stress is so dangerous to you and what you can do to lessen the impact it has on your life
- Be engaged and walk away with practical ideas that will not add more to your to-do-list
- Apply your skills and save yourself

**Kelly Davis Martin**, *Director, Achieve Wellness*

OR

**Case study: How Beca deals with compliance issues across borders**  
Changes in regulations or changes in the way a business operates can often mean a whole new plan for the organisation, where they must reconfigure themselves to ensure they are compliant and competitive. Include this to the complexity of operating across international borders; the compliance challenge becomes even more demanding.

- Build and maintain a strong compliance culture
- Undertake appropriate due diligence as it begins trading in a new jurisdiction
- Develop and maintain programmes and establish responsibilities for compliance
- Keep up to date with subsequent regulatory changes

**Mark Stinson**, *Group Accounting and Compliance Director, Beca*

10.40 Morning tea

11.00 **The 5 C's of recruiting, engaging and retaining critical people**  
With a looming global critical skills shortage and shocking employee engagement statistics, employee recruitment and retention are quickly becoming THE issue that will make or break your business. Take away valuable tips and apply them immediately to:

- Hire Correctly
- Classify and Manage Appropriately
- Compensate Fairly
- Use "Currencies of Choice" to structure a highly engaging work environment
- Communicate with FOCUS for enhanced productivity

**Kim Seeling Smith**, *International Speaker, trainer and coach on staff retention and career management*

OR

**The future role of business analytics for performance management**  
Conventional financial planning is filled with obstacles. With advancements in both processes and technology organisations are gaining results. This session will provide an overview of effective financial modeling and key components to consider when preparing financial models.

- A framework for integrated performance management, including financial planning and reporting/analytics
- Advanced solutions to enable organisation-wide reporting
- Practical examples from the New Zealand Police point of view

**Justin Bangma**, *Senior Financial Analyst, New Zealand Police*

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12.00 Lunch

1.00 **One Stop Economic Update**

The events of Christchurch of have placed an even bigger burden on the New Zealand economy. The question of where the economy will go to from here is something everyone is asking. There is no doubt that New Zealand is in a recession, the longer term risk of inflation growing which could prompt a rise of inflation rates is keeping organisations facing a future of uncertainty.

- The key global economic indicators and outlook
- Interest rates
- Exchange rates
- Areas of possible growth and future opportunities



**In Auckland:**

**Tony Alexander**, *Chief Economist, Bank of New Zealand*



**In Wellington:**

**Shamubeel Eaquab**, *Principal Economist, New Zealand Institute of Economic Research*

1.45 **Keynote Address: Directors as professionals: Why directors need high skills and global perspectives**

Having a skilled director with the right qualifications provide a sound perspective and guidance for company executive is vital in this globalised world. There are various ways that a board can deliver additional value and offer a comparative advantage in an increasing globalised world.

In particular, Janine will discuss the following:

- Making a successful shift from management to governance. What are the differences? What is the board's role?
- What qualities does a director need?
- What are the characteristics that lead to an effective board?
- What are the key influences for a board to add value to an organisation?



Janine will draw upon her research from interviews with directors, chairs and CEOs of New Zealand publicly listed companies (PLCs) and state owned enterprises, as well as her own experience over the last 12 years as a director of both PLCs and SOEs.

**Janine Smith**, *Director, The Warehouse Group & Kordia, Chairman, McLarens Young New Zealand*

2.30 Afternoon tea

2.50 **One Stop Update on Employment Law**

New Zealand has undergone one of the largest transformations in years in employment law with changes to the Employment Relations Act and Holiday Act. This vital One Stop Update will provide you with all the latest developments.

- Latest employment legislation
- Changes to the Holiday Act & Employment Relations Act
- Practical case law examples



**In Auckland:**

**Kathryn Beck**, *Partner, Swarbrick Beck Mackinnon*



**In Wellington:**

**Michael Quigg**, *Partner, Quigg Partners*

4.10 **Closing Inspirational Keynote Address from Irene Van Dyk**

Irene Van Dyk has gone from strength to strength since joining the Silver Ferns squad in 2000. Irene was named Sportswoman of the Year at the 2004 Halberg Awards, and holds the world record for international test caps while also holding the record as the most capped Silver Fern of all time. Irene will share with us her reflections from an amazing career to date.

- The driving force
- Lessons on life learned along the way
- The secrets of personal resilience



**Irene Van Dyk**, *Silver Fern*

4.50 Closing remarks from the Chair and end of conference



# MASTERCLASSES

MASTERCLASS A  
9th November 2011, Wellington\* | 14th November 2011, Auckland

MASTER CLASS B  
9th November 2011, Wellington\* | 14th November 2011, Auckland

## Communicating with influence across, down and up the organisation for Finance and Accounting Professionals

### Understanding your Audience

Identifying your audience and what their requirements are.

- User groups:
- Management
- Shareholders
- Suppliers
- Front Line employees
- What information is most relevant to each group?
- Finding out what information the audience really wants to know

### Presenting Financial Information

- Intent of financial information – informative or persuasive
- Deciding on your key message
- Tailoring financial information to the decisions to be made
- Choosing your graph/chart and visual style
- Preparing intelligible displays
- Anticipating questions and preparing answers

### Using Financial Information to Identify Wider Performance Issues

- Identifying areas where financial risks can be improved
- Monitoring trends and mitigating risk
- How to present financial information within the wider context of the companies performance
- Integrating financial information with performance information
- Identifying key financial drivers of the business
- Providing the framework for exercising accountability
- Use of ratio calculations to report on performance

### Understanding your Communicative Style

- Building awareness of your communicative style
- Delivering a compelling message
- Improving your communication skills e.g. awareness and listening

## Building a World Class Strong Finance Team

*“What makes the most difference in your company’s success boils down to how many of your employees are better than your competitors”. - Wayne Brockbank, Director of the Centre of Strategic HR Leadership and Business Professor, University of Michigan*

Not every company needs a “world class” finance function. But building a strong finance team increases the value add of the finance department, better engages your staff and enhances their job satisfaction and productivity, reduces your own stress as a manager and increases your fulfilment.

Building a strong finance team consists of hiring the right people and providing the appropriate environment to allow them to thrive and produce their best work.

### Why Build a World Class Strong Finance Team?

- What does a strong finance function look like and why should we strive to create one in even the smallest organisations?
- Emerging expectations of leading organisations for their finance departments
- Cost savings through better recruitment and retention
- Debunking recruitment and retention myths

### Out with the Old, In with the New

- Understanding the limitations of traditional finance structures
- Transitioning finance from a compliance and control orientation to a performance and value focus
- Succession planning

### Secrets of Great Recruiting Revealed!

- Tips, tricks and techniques from a 15 year Accounting and Finance Recruitment veteran
- Profiling for success
- Advanced Interviewing Skills

### Using 21st Century Leadership Methods to Engage and Retain Staff

- 21st Century Leadership: overview of how leadership has changed throughout the ages
- Generational differences: working with people from different age groups
- Using the 80 / 20 rule to identify and manage “Critical People”
- Communicating with FOCUS

### Bill Butler, Director, Academy of Training



Mr Bill Butler B.Com, C.A, Dip. Soc. Sci. (Psychol) has a wealth of training experience gained in a variety of organisations and cultures following his entry into the personnel development field when he set up his own consultancy. Prior to that he was General Manager of the New Zealand Institute of Chartered Accountants. Bill has successfully presented in house and public programmes for literally hundreds of commercial organisations, government departments, local authorities and SOEs, bringing to each a unique combination of business, communication and people skills. Bill adopts a consultative and interactive approach to all his training, drawing on the work environment, examples and experience of all participants. He has a strong background in management and with his qualifications in Accounting, Business Management and Psychology, he is able to present to a diverse range of programmes to Senior Management and support staff alike. In the training role, he seeks to engender a crystal clear focus on outcomes through a thoroughly professional approach which is both motivational and innovative.



### Kim Seeling Smith, International Speaker, Trainer and Coach on Staff Retention and Career Management

Originally trained as an American CPA with KPMG, Kim quickly realised that Accounting was not her bliss and became her first Career Coaching client. In 1994 she began her recruitment career and spent 15 incredible years studying the differences between those talented and capable people who managed to attain all of their professional and personal goals, and those equally talented and capable people who seemed to plateau, or worse, senselessly slide backwards as they neared them.

Kim now shares these distinctions in her “Critical Path” series of programs centering around Career Management and Employee Retention. Kim has recently been asked to present to the HR Summit in Singapore, Asia’s premier HR event, in May of this year and is a co-author of “101 Great Ways to Enhance Your Career” available on Amazon.

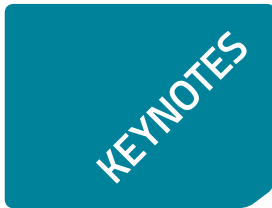
\* Please note the Wellington Masterclasses will be held at Amora Hotel, Wellington



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## KEYNOTE ADDRESSES FROM:

**Craig Richardson**, CEO, Jade Software  
**Peter Floris**, CFO, The New Zealand Merino Company  
**Irene Van Dyk**, Silver Fern  
**Janine Smith**, Director, The Warehouse Group&Kordia



## TWO STREAMS COVERING A RANGE OF TOPICS:

Technical and Accounting  
 Business strategy  
 Risk  
 Professional development



## KEY ONE STOP UPDATES:

Economic Update  
 Employment Law Update  
 Tax Update  
 Accounting Standards and IFRS Update



## TWO SEPARATELY BOOKABLE MASTERCLASSES

**Masterclass A:** Communicating with Influence across, down and up the organisation for Finance and Accounting Professionals

**Masterclass B:** Building a world class finance function

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