



ORACLE®

Planning & Budgeting In the Cloud

A Financial Innovation Seminar

26 March 2015

South Place Hotel, London EC2



Planning & Budgeting In the Cloud

Today's Speakers



Peter Simons BBS, MBA, ACMA, CGMA
Research & Future of Finance Specialist
CIMA

Peter Simons joined CIMA in 2006 with 30 years' prior experience in business. He has held roles in strategy, corporate lending, credit management and marketing at Bank of Ireland. He was the head of a division and on the bank's senior management team in London when he left in 2002 to become the Managing Director of an entrepreneurial small business. Peter is now the technical specialist in the applied research unit in CIMA's education department. He works with employers, consultants, software vendors and academics to explore the future roles of organisations' in-house finance professionals. He also helps to develop CIMA's expertise in performance management.



Wayne Heather
Director
Business Analytics Cloud Services
Oracle

Wayne Heather has over 15 years of experience in EPM covering a wide range of senior roles in consultancy services, sales, partner management and latterly in global market development. He has worked in end user, consultancy and software house businesses with both national and international responsibilities. Organisations that Wayne has worked for include First National Bank, Hyperion Corp., Aer Lingus, Cognos, IBM and now Oracle. He has implemented solutions in many industries including Financial Services, Manufacturing, Retail, Travel and Transport. Wayne now focuses on growing and supporting Oracle's EPM Cloud portfolio and speaks internationally on EPM and Cloud.



Jason Fitzgerald
Managing Director EMEA
Enterprise Performance Management
The Hackett Group

Jason Fitzgerald is global lead for The Hackett Group's Enterprise Performance Management (EPM) strategy team and currently leads the European EPM/Business Intelligence (BI) practice in helping complex global organisations bridge the gap between diverse business requirements and IT imperatives. In his 18 years of experience, he has led application reengineering efforts to build successful alignment of EPM and BI strategies across functions such as finance, sales, marketing and IT. Jason has organised centralised and federated centres of excellence for business analytic imperatives with a balance of shared services and optimised shoring models. He studied International Business at Wroxton College, England, and holds an MBA from Columbia University.



Bruce Claassen, FCA
FP&A Specialist and
Managing Director
Sonar Consulting

Bruce is the MD of Sonar, a specialist FP&A consultancy business. He is a Fellow of the ICAEW, sits on the LSQA's London Business Board and has spent the last 10 years working as the Head of Group FP&A for some of the UK's most successful multinationals. Having worked across a number of different industry sectors, he has gained first hand insight into how businesses can enhance their financial reporting, planning and systems capabilities in order to achieve greater insight into business performance. Prior to establishing Sonar, he spent 4 years at Tullett Prebon plc, where he led a series of projects to enhance their financial reporting and planning capabilities by leveraging smart technology, people skills and process optimisation.

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Today's Agenda



- 9:30am** **Welcome**
Nigel Youell
Senior Director, Product Marketing, EPM, Oracle
- 9:35am** **The Effects of Cloud on Management Accounting & Decision-making**
Peter Simons BBS, MBA, ACMA, CGMA
Chartered Institute of Management Accountants (CIMA)
- 9:55am** **World Class Planning – Lean, Light and Late**
Jason Fitzgerald
Managing Director, European EPM, The Hackett Group
- 10:15am** **Modern Business. Modern Finance. Modern Cloud.**
Wayne Heather
Director, Business Analytics Cloud Services, Oracle
- 10:35am** **How Top Companies Achieve Effective Performance Management**
Bruce Claassen, FCA
FP&A Specialist and MD of Sonar Consulting
- 10:55am** **Roundup**
Nigel Youell
Senior Director, Product Marketing, EPM
Oracle
- 11:00am** **Close/networking**
Join your speakers in the Garden Bar for coffee until midday



Planning & Budgeting In the Cloud

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