

# 2017 Controllers Conference Agenda

## 8:30-9:45 a.m. General Session

### Economic Update

[Willard Witte, Ph.D., Indiana University](#)

Retired economics professor Willard Witte discusses the economy's current status, where it's headed and how the Trump administration's policies might impact the outlook in the coming year.

## 9:45-9:55 a.m. Networking Break

## 9:55-11:35 a.m. Breakout Sessions

### A. Risk Analysis and Management (A&A)

[John Levy, CPA, Board Advisory](#)

In this turbulent world, risk management responsibility has fallen squarely on financial management's shoulders. Audit committees and external auditors are asking questions they never asked before. We must prepare to give them answers! Come get insights about Enterprise Risk Management (ERM) and what standards such as the COSO ERM model say every organization must do.

### B. Explaining Variances to Your CEO and Management Team (A&A)

[C.S. "Bud" Kulesza, CMA, CFM, Executive Education, Inc.](#)

Your Board, CEO and management team want answers when results do not turn out as everyone planned. The explanation may involve a complicated variance analysis that some non-accountants may find difficult to understand. This session provides insight into how to explain these concepts clearly, concisely and visually so everyone can understand and deal with the issues that challenge your organization.

## 11:35 a.m.-12:15 p.m. Conference Luncheon

## 12:15-1:55 p.m. Breakout Sessions

### A. Staff Retention: Attract and Keep the Best People

[Don Minges, The Numbers Guy CFO, LLC](#)

Does it seem like you spend far too much time recruiting? Do your people leave just as they become productive? If you think your turnover is because Millennials are different from earlier generations, you probably are not looking at the real source of your problem. Learn the changes you should make now!

### B. Creating Great Projections & Budgets

[John Levy, CPA, Board Advisory](#)

Like going to the dentist or running on a treadmill, we know our organization's budgeting process is good for us even though most of us dread it. However, if we truly understand why budgeting is so important, it becomes both easier and less terrifying. This session will examine budgeting pitfalls, ways to avoid budget traps and ways to improve the budgeting process through better measurement and reporting.

## 1:55-2:05 p.m. Networking Break

## **2:05-3 p.m. Breakout Sessions**

### **A. Leadership by the Numbers**

*C.S. "Bud" Kulesza, CMA, CFM, Executive Education, Inc.*

There are many lists of advice for anyone who aspires to a leadership position. This entertaining and informative session shares some notable leaders' lists, identifying common themes that can provide important lessons for anyone who has, or aspires to have, a leadership role in their organization.

### **B. Corporate Finance: Valuing a Business**

*Don Minges, The Numbers Guy CFO, LLC*

This session discusses various business valuation methods, whether for a start-up, spin-off or acquisition at any stage. Many valuation methods exist. Which method is right? Which is the "best" for a given business? Program content includes crucial topics such as: the absolute single best metric, the Cost of Capital, the capital asset pricing model and Weighted Average Cost of Capital (WACC), Valuation methodologies (income, asset and market approaches), Discounted Cash Flow (DCF) and many more. Corporate financial managers cannot afford to miss this session.

## **3-3:15 p.m. Networking Break**

### **3:15-4:30 p.m. General Session**

#### **Heartfelt Leadership: How Ethical Leaders Build Trusting Organizations (Ethics)**

*John Levy, CPA, Board Advisory*

Leaders provide the culture, environment, values and incentives that foster and encourage change. Most importantly, great leaders create environments of trust that allow employees to challenge, innovate and work as teams. In a rapidly changing world, heartfelt leaders build great organizations. Understand the qualities of a great leader and find out how you can become a great and heartfelt leader, no matter your title or place in an organization.

## **4:30 p.m. Adjourn**