

CPA ONTARIO'S CONFERENCE FOR CONTROLLERS

March 30-31, 2016 | Mississauga

CPAONTARIO.CA/CONTROLLERSCONF



For Professionals. By Professionals.
Your Pathway To Success.

Don't miss this opportunity to hear from Canadian thought leaders at CPA Ontario's Conference for Controllers. This two-day, high profile event will provide you and other experienced or aspiring controllers, with bright ideas and a chance to expand your professional network.

Wednesday, March 30, 2016

7 - 8 a.m.

REGISTRATION, NETWORKING BREAKFAST AND EXHIBITOR SHOWCASE

8 - 9 a.m.

PANEL DISCUSSION: ECONOMIC UPDATE

Douglas Porter, CFA, Chief Economist and Managing Director, Economic Research, BMO Financial Group
Derek Burleton, Deputy Chief Economist, TD Bank Group

9:15 a.m. - 12 p.m.

CONCURRENT SESSIONS (SELECT ONE)

BUILDING A HIGH PERFORMANCE TEAM

Peter Taylor, Founder, Peter Taylor & Associates Inc.

Equip yourself to become an effective team leader or team member.

In this 90-minute workshop, explore some of the factors that may be holding back your team from performing at its optimal level. Gain applicable tips for reinforcing performance and encouraging change in team members, and end your session with an example of the investment necessary to create a high performing team.

RISK MANAGEMENT PRIMER AND RISK MANAGEMENT TOOLS

Bill Wesioly, CPA, CMA, Senior Risk Management Consultant and Professional Transition Coach

A prime understanding and knowledge of risk management is especially important in today's business climate. And finance professionals are right at the forefront of that demand for knowledge.

Brush up on the fundamentals of risk management and arm yourself with two new tools - Key Risk Indicators and Risk and Control Assessments that will assist organizations in understanding and acting upon perceived risk.

TOOLS FOR OPTIMIZING CASH MANAGEMENT

Jeffrey Sherman, FCPA, FCA, Chief Financial Officer, Atrium Mortgage Investment Corporation

When was the last time you thought about changing how you manage cash? By using the right cash management strategies, businesses can profoundly improve their operations and bottom lines. You may be surprised at the pervasive impact that effective cash management can have on your business.

Learn the building blocks of cash management, how to control and optimize cash, mapping your cash flows and other tools that you can take back to the office and begin using right away.

POWERFUL ADVANCED OUTLOOK TECHNIQUES FOR LEADERSHIP

Paul Mascarenhas, Principal and Founder, Avancer Learning Inc.

Microsoft Outlook is one of the most powerful office productivity applications available today. Many people spend up to a quarter of their workday in Outlook. However, being able to tap into its more powerful tools for inbox management, mail handling and automation, editor shortcuts and calendar techniques can save a significant amount of time. This workshop explores some of these lesser known power techniques that will allow you to increase your productivity and organizational skills. Participants will work hands-on in Outlook with the instructor, using their own Outlook installation.

1. Setting up Your Inbox – How to set up and use ‘views’ on single and multiple folders; how to add views with conditional formatting, layouts and more.
2. Managing your Inbox – How to customize your inbox using user-defined fields such as formula fields, text fields, checkboxes and tags to make email management easier and semi-automated
3. Quick Parts and Shortcuts – How to use re-usable content in Outlook and speed up the creation of mail through quick parts and key board shortcuts.
4. Rules – How to automate mail handling for incoming and outgoing mail by implementing rules.

OPTIONAL (Time Dependent)

5. Exploring Templates – How to speed up recurrent mail (such as monthly reports and bulletins) and recurrent meetings through templates, and access them with a couple of clicks.

12 – 1 p.m.

NETWORKING LUNCH AND EXHIBITOR SHOWCASE

1 – 2 p.m.

TO BE ANNOUNCED

2 – 3 p.m.

RETAINING AND OPTIMIZING TALENT: PREPARING FOR EFFECTIVE SUCCESSION PLANNING

Gerlinde Herrmann, CDir, GPHR, CHRL, Founder, President, The Herrmann Group Limited

As leading financial professionals, you probably already know that one of the biggest financial impacts to an organization is the cost of identifying, attracting, developing, retaining and engaging a high performing workforce. And, more importantly the risk to the organizational sustainability if the management of talent resources is not effective.

This session will focus on succession planning, a key component to talent management. Effective succession planning can contribute greatly to the positive management of human capital risk. In this session we will discuss the differences between effective and less effective succession planning and its direct impact on your bottom-line and the viability of your organization.

3 – 3:30 p.m.

NETWORKING BREAK AND EXHIBITOR SHOWCASE

3:30 – 4:30 p.m.

PRODUCTIVITY AND COLLABORATION IN THE AGE OF DIGITAL DISTRACTION

Jesse Brown, Digital Media Expert and Futurist

Has technology actually made us more productive, or does it just distract us with endless diversions? In this interactive presentation, Jesse Brown explains how the world's most progressive organizations are rethinking productivity and tapping into the collaborative social dynamics of the transparent, networked workplace.

4:30 – 5:30 p.m.

NETWORKING RECEPTION AND EXHIBITOR SHOWCASE

Thursday, March 31, 2016

7 - 8 a.m.

REGISTRATION, NETWORKING BREAKFAST AND EXHIBITOR SHOWCASE

8 - 9 a.m.

THE FUTURE OF PERFORMANCE MANAGEMENT IN A MULTIGENERATIONAL WORKPLACE

Giselle Kovary, President and Co-founder, n-gen People Performance Inc.

Managing performance is a difficult exercise in any size of organization. There are numerous elements to performance management – from setting goals that align to strategy, to measuring what people do, and evaluating how they do it. In n-gen's national survey in 2009, they measured employees' perceptions on how well their performance is being measured by their employer. The good news is that many employees felt strongly that their performance is being accurately measured. However, feedback from the hundreds of organizations with which n-gen has worked, is that performance management remains one of the leading people challenges. One reason it is viewed as a difficult process is that the four generations (Traditionalists, Baby Boomers, Gen Xers and Gen Ys) have different expectations as to how their performance should be measured, and how managers should conduct performance management practices on a day-to-day basis.

This keynote highlights what employees and managers are saying about performance management, based on both the n-gen Generational Index survey and from n-gen consulting work. Kovary uses this data, in conjunction with research on generational expectations and performance management theory, to highlight the future of performance management.

9:15 a.m. - 12 p.m.

CONCURRENT SESSIONS (SELECT ONE)

OKRS: OBJECTIVES AND KEY RESULTS TO DRIVE BUSINESS PERFORMANCE

Brett Knowles, Executive Partner, pm2 - Performance Measurement and Management

This workshop is the perfect entry into the world of the Objectives and Key Results. Get to know how the leadership methods from Intel, Google, LinkedIn and Twitter can lead to better results in your company or team. Objectives and Key Results (OKRs) is a management method that connects the company's goals of each employee and sets a clear focus for the next three months. OKRs help companies establish a disciplined goal setting process and clarify for their employees that they are working on the right things. Learn how OKRs support communication through transparency and clarity, how they connect vision, mission and strategy for short-term operational planning, and how they will help you decide how to use scarce resources.

The session will cover frequently asked questions and outline common implementation pitfalls. Numerous practical examples of the OKR model in start-ups and small to medium enterprises will be used to illustrate the benefits of OKRs.

THE POWER OF THE PLAN - PROJECT MANAGEMENT FOR NON-PROJECT MANAGERS

David Barrett, National Program Director, Centre of Excellence in Project Management

We all manage projects regardless of how small they are. Some are extremely important and time sensitive to us personally. Others are just as critical to our organizations, our jobs and our careers. But we have never thought of ourselves as project managers. And we never will. We have never taken a project management course and we won't.

In this high-energy session, David Barrett, author of *The Power of the Plan: Empowering the Leader Within You*, will lead the audience through a process that will empower anyone to be able to say "Yes" to the next challenge or project. From the "go, no-go" decision, to the basic plan, the budget, through to the all-important "Managing the people", David's simple, easy-to-understand process will leave everyone with tools they can use on any project – empowering the leader within us all.

RESPECT IN THE WORKPLACE AND HARASSMENT AND INVESTIGATION

Jordan Rodney, President, MaxPeoplePerform
Miriam Anbar, Legal Advisor, MaxPeoplePerform

This workshop will provide you with an overview of an employer's legislative duties and obligations with respect to harassment and violence under Ontario's *Bill 168*. Although *Bill 168* is specific to Ontario, the spirit of the legislation is applicable across all jurisdictions. This workshop will also educate you on the costs and consequences of violence and harassment in the workplace. You will learn how to identify actual and potential risk in your workplace as it relates to harassment and violence, and how to implement proper policies and processes in your organization. The objective of the session is to provide you with a guide to employing proper Respect in the Workplace policies in today's workplace while, at the same time, satisfying due diligence requirements.

In addition, you will be provided with practical guidelines to deal with claims of harassment or violence and tips on how to conduct proper workplace investigations. You will learn about the importance of conducting a comprehensive investigation in today's challenging work environment and also what not to do in these situations. Given the legislative changes, new technology and social media enhancements and the increasing level of sophistication, managers need to be fully equipped to carry out workplace investigations pertaining to harassment, bullying and workplace violence.

12 - 12:45 p.m.

NETWORKING LUNCH AND EXHIBITOR SHOWCASE

12:45 - 1:45 p.m.

THE GAMIFICATION OF BUSINESS

Brett Knowles, Executive Partner, pm2 -
Performance Measurement and Management

Gamification takes the data-driven techniques that game designers use to engage players, and applies them to non-game experiences to motivate actions that add value to your business.

Seventy-one per cent of employees are not fully engaged - and the cost of disengaged employees in Canada is estimated at \$37 billion annually or between 100 per cent and 300 per cent of an organization's base salary.

Gamification is transforming business models by creating new ways to extend relationships, craft longer-term engagement, and drive customer and employee loyalty. Organizations with engaged employees outperform those without by more than 200 per cent. They enjoy a 50 per cent higher

shareholder return, 18 per cent higher productivity, 60 per cent higher quality and have 48 per cent fewer safety incidents.

Gamification appeals to our intrinsic motivators - most importantly to our need to understand our purpose, mastery of the skills to achieve that purpose, and autonomy to get the work done. In this keynote speech, Brett Knowles will share his deep knowledge in gamification and stories from his clients - organizations like Google, Yahoo and CPA Canada. This session is sure to provide you with many ideas that you can apply to your organization.

1:45 p.m.

PROACTIVELY DEALING WITH HUMAN RIGHTS AND ACCOMMODATION AT WORK

Jordan Rodney, President, MaxPeoplePerform

Discrimination in the workplace is a serious issue that is a growing concern in businesses across the country. As an employer, you have a mandatory legal obligation to ensure that your workplace is free from any form of discrimination. Employers also have a legislated "duty to accommodate", which requires them to accommodate in a manner that most respects the dignity of the individual, meets individual needs, best promotes integration and full participation, and ensures confidentiality. Workplace Discrimination is common and often occurs under the employer's radar. These types of matters not only decrease productivity among the workforce but may lead to severe legal complications for your business. It is an employer's responsibility to cultivate a healthy work environment.

This session will review the different types of discrimination and the general principles governing the concept of the "Duty to Accommodate." You will learn how to manage discrimination-related complaints and how to better protect your organization against potential claims.

2:45 - 3 p.m.

NETWORKING BREAK AND EXHIBITOR SHOWCASE

3 - 4 p.m.

TO BE ANNOUNCED

GENERAL INFORMATION

CPAs and CPA Students:

Full Conference: \$895+HST
 Wednesday Only: \$499+HST
 Thursday Only: \$499+HST

Non-Member:

Full Conference: \$1095+HST
 Wednesday Only: \$599+HST
 Thursday Only: \$599+HST

Personal Passport:

Full Conference: \$700+HST
 Wednesday Only: \$350+HST
 Thursday Only: \$350+HST

Organizational Passport:

Full Conference: \$825+HST
 Wednesday Only: \$412.50+HST
 Thursday Only: \$412.50+HST

Delegate registration fees for the conference include all sessions, session materials, refreshments and meals.

HOW TO REGISTER

Register online: pd.cpaontario.ca

CONFIRMATIONS

A confirmation email will be sent to you the week of the conference. Please ensure your email account is up to date.

CANCELLATION POLICY

Delegates may withdraw from the conference up until March 16, 2016 and receive a credit memo on their PD account. A withdrawal fee of \$50 will apply. After March 16, 2016, delegates will receive no credit for cancelling. Delegates may send a substitute in their place at any time.

OTHER INFORMATION

Recommended dress is business casual.

If you require special accommodations or have dietary restrictions, please include applicable details on your registration online.

CONTINUING PROFESSIONAL DEVELOPMENT (CPD)

Attendance at the full conference may qualify for 16 CPD hours.

ACCOMMODATIONS

The Four Points by Sheraton Toronto Airport has extended a special guest room rate of \$115 plus applicable taxes (single or double occupancy) per room, per night. Please make your reservations before

March 14 by calling 905 678.1400 or 1 866 716.8133 using the group code "**CPA Group**". Alternatively, you can book online using the following link: **CPA Group 2016**

Check-in time is 3 p.m.

Check-out time is 12 p.m.

PARKING & SHUTTLE SERVICE

The Four Points by Sheraton Toronto Airport has offered a special parking rate at the hotel for \$8.00 per day. All attendees must register vehicle license plate at the Front Desk to obtain the discounted fee. The hotel offers free shuttle bus to and from The International Centre. However, parking at the International Centre is free of charge.