



IT Series - Budgeting, Planning and Financial Forecasting Workshop

Finance departments need a faster and more reliable way to pull together information from all functions and create plans and budgets that are timely and relevant. In this workshop, the trainer will introduce and demonstrate an IT solution – **IBM Planning Analytics**, which offers a unified and automated budgeting approach for integrating operational and financial planning. It serves as a source for the “what is” and “what if” scenarios critical to forecasting and anticipating future performance.

The trainer will cover the following content through demo of the IT solution:

- Business model creation that supports budgeting and forecasting across business units
- Guided workflow and task summary which allow contributors in business units to input various data
- Business scenarios evaluation from the top down to the individual level (e.g. by cost center, product, sales channel, customer)
- Model scenarios and simulation for “what-if” analysis
- Ad-hoc query to slice-and-dice information to answer questions and monitor impact
- Dashboards providing key information relevant to business function
- Drill-down from dashboards to answer questions and depict status of expenditures from various perspectives

Participants who enrol this workshop will be offered a **5-week trial use** of IBM Planning Analytics (starting from the workshop date) in order to learn through practice at workplace or home with IBM’s technical support (please click [here](#) for detailed features of IBM Planning Analytics).



About the programme

Dates	Thursday, 30 March 2017 (Programme code: WSHP17033001); or Wednesday, 10 May 2017 (Programme code: WSHP17051001)
Time	6:30 p.m. – 9:30 p.m.
Venue	Cliftons Hong Kong, 5/F, Hutchison House, 10 Harcourt Road, Central, Hong Kong
Format	Workshop
Language	Cantonese
Fee (for one session)	HKICPA member or student: HK\$1,000 IA/ HKIAAT member or student: HK\$1,000 Non-member: HK\$2,000 <i>(Including the license fee charged for the 5-week trial use of IBM Planning Analytics)</i>
Participants	Persons who are interested in understanding the IT solutions available in the market which help enhance the efficiency and effectiveness of finance functions
Competency*	Information technology
Rating*	Intermediate level
CPD hours (for one session)	3

* Please refer to the [Institute's online CPD Learning Resource Centre](#) for descriptions of competency and rating.

About the trainer

Mr. Chris Ting, Senior FOPM Solution Specialist, IBM Analytics, IBM Hong Kong

Mr. Ting is responsible for the development of IBM Financial and Operational Performance Management (FOPM) software solutions for Hong Kong clients, helping them monitoring, managing and planning activities across the enterprise to enhance business outcomes.

Mr. Ting has over 15 years of IBM FOPM project management, consultation and implementation experience across a range of industries, including banking, insurance, telecommunication, property development and management, retail/wholesale, consumer packaged goods, logistics and manufacturing in the Asia Pacific region.



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HKICPA Event Enrolment Form

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Course Information Enquiry:
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FOR OFFICE USE

Deadline: 7 working days before the date of the programme

No.	Membership		Full Name of Participant(s) (Block Letters)	Company	Email address ⁽²⁾ (Block Letters)	Programme Code	Fee (HK\$)
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- Notes:**
- Membership Status: **NP** = Non-Practising, **P** = Practising, **IA** = International Affiliate, **S** = Student, **HKIAAT** = HKIAAT Student or Member, **GAA** = GAA Passport holder, **NM** = Non-Member.
 - Confirmation of enrolment will be sent to you via email. You can check your enrolment status at "MyCPA" at www.hkicpa.org.hk. Unsuccessful enrolment will be notified with full refund.
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 - All applications are on a first-come-first-served basis.
 - Application by fax will ONLY be accepted when payment is made by credit card. Cash is strictly not accepted. Please ensure all the particulars relating to payment are completed, otherwise the application cannot be processed. There is NO need to send in the enrolment form again if it has already been faxed to the Institute.
 - For credit card payment, the card should be valid with expiry date at least 1 month from the date of event.
 - Please issue SEPARATE CHEQUE for each event.
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 - All scheduled events will be cancelled and postponed to a date to be announced in the event of typhoon signal no. 8 or above or if a Black Rainstorm warning is hoisted. For details of bad weather arrangement for CPD programmes, please refer to the Institute's homepage.
 - The Institute reserves the right to change the venue, date, speaker or to cancel the event due to unforeseen circumstances.
 - No unauthorized audio or video recording is allowed at CPD events.

Personal Data: Your personal data collected from the enrolment process and administration of courses/events/activities will be used for the purpose of the administration of the course on which you are enrolled. Such data collected may be accessible by the Institute's officers, persons or committees processing the application and related matters. In addition, the Institute may use the collected data for statistical research and analysis. The Institute intends to use the personal data of your name, email address and correspondence address to inform you, where relevant, of members' benefits, goods, services, facilities and events organized or provided by the Institute or other organizations. Members and registered students may opt out of receiving such materials at any time by logging in via the following link <https://www.hkicpa.org.hk/en/members-area/comm-preference/>. Non-members may opt out of receiving such materials at any time by sending an email to the Institute at privacyofficer@hkicpa.org.hk or a letter to the Institute's privacy officer. For more information about the privacy policy of the Institute, please go to <http://www.hkicpa.org.hk/en/service-tools/privacy-policy/>.

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