

# CFMA PEER GROUP PROGRAM

## Sample Peer Group Agenda Wednesday, Oct. 9 to Friday, Oct. 11

Title	Duration	Notes
Wednesday, Oct. 9		Arrive at Hotel
Thursday, Oct. 10		
Welcome	8 – 8:15 am	Introductions and Housekeeping
Morning Session #1	8:15 – 10:15 am	<p>Each member will get 10 minutes to discuss their companies background and processes examples to discuss financial reporting how often and who you share information with and to what frequency you share it. If possible please bring examples. May include:</p> <ul style="list-style-type: none"> <li>• Roll as CFO / Controller</li> <li>• Monthly reporting packages</li> <li>• Best practices in monthly close and financial production process</li> <li>• Dashboards / KPI's</li> <li>• Allocation of Overhead to Divisions/Jobs</li> <li>• WIP Schedules - excel or accounting system</li> <li>• Cash flows and Projections</li> <li>• Forecasting and Cost to Complete Procedures</li> </ul>
Break	10:15 – 10:30 am	
Morning Session #2	10:30 – 11:45 am	<ul style="list-style-type: none"> <li>• Health insurance</li> <li>• Pay structure</li> <li>• Recruiting – retention</li> <li>• Employee benefits</li> </ul>
Lunch	11:45 am – 12:30 pm	
Afternoon Session #1	12:30 – 2:30 pm	<ul style="list-style-type: none"> <li>• Corporate Culture</li> <li>• Discussion Employee Engagement</li> <li>• Use of Social media</li> </ul>
Break	2:30 – 3 pm	

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Afternoon Session #2	3 – 5 pm	<ul style="list-style-type: none"> <li>• Corresponding with remote employees, company portal, email, texting, remote time and expense reporting</li> <li>• What accounting software do you use and what are strengths and weaknesses.</li> <li>• Productivity software from the field</li> <li>• Production metrics</li> </ul>
Friday, Oct. 11		
Morning Session #1	8 – 9:20 am	<ul style="list-style-type: none"> <li>• Forecaster presentation</li> <li>• Succession Planning               <ul style="list-style-type: none"> <li>• Your status where are you at in the process.</li> <li>• Ideas that you are working on</li> <li>• Concerns</li> </ul> </li> </ul>
Break	9:20 – 9:40 am	
Morning Session #2	9:40 – 11:30 am	<ul style="list-style-type: none"> <li>• 2019-2020 Outlook including backlog discussion</li> <li>• Lightning round</li> <li>• Misc. and catchup</li> </ul>
Conclude		