



# EPM SUMMIT ROADSHOW




## PALO ALTO

**NOV  
16  
2016**

SAP Office - Palo Alto  
3410 Hillview Ave.  
Palo Alto, CA 94304

**9:00am - 4:30pm**

**FREE**

TIME	ROOM #1	ROOM #2
9:00 am	 <b>BREAKFAST &amp; OPENING REMARKS</b>	
9:30 am	<b>Opening Keynote by Ivo Bauermann - Global VP &amp; GM of EPM &amp; ERP Financials at SAP</b>	
10:00 am	<b>SAP BusinessObjects Cloud - Overview &amp; BPC Integration</b>	<b>Logic Approaches Overview</b>
11:00 am	<b>Flextronics' Journey with BPC for Global Planning, Consolidations and Reporting</b>	Roundtable: <b>BPC Performance Issues</b>
12:00 pm	Roundtable: <b>Maximize the Value from Your Investment in BPC</b>	<b>How New Balance Athletics Continues to Leverage BPC to Meet their Evolving Financial &amp; Management Reporting Needs</b>
1:00 pm	 <b>LUNCH</b>	
1:30 pm	<b>BPC Web: Reports &amp; Input Forms *</b>	
2:30 pm	<b>Important EPM Functions in Reporting *</b>	
3:30 pm	<b>Fundamentals of Metadata *</b>	
4:30 pm	<b>Closing Remarks</b>	

\* Sessions are hands-on; software will be provided to work through exercises. **Please bring your own laptop.**

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## SESSION DESCRIPTIONS

Room #1

**Title:** **SAP BusinessObjects Cloud - Overview & BPC Integration**

**Description:** This session will focus on the Planning and BI / Visualization features and benefits of SAP BusinessObjects Cloud. We will also demonstrate integration with SAP Business Planning and Consolidation (BPC) and discuss several use-cases that involve SAP BPC and SAP BusinessObjects Cloud working side by side.

**Presenter(s):** Ty Jessup

**Time:** 10:00 am - 10:50 am

**Title:** **Flextronics' Journey with BPC for Global Planning, Consolidations and Reporting**

**Description:** Flextronics International Ltd. is a leading sketch-to-scale™ solutions company that designs and builds intelligent products for a connected world. With approximately 200,000 dedicated innovators across 30 countries and a promise to help the world Live smarter™, the company provides innovative design, engineering, manufacturing, real-time supply chain insight and logistics services to companies of all sizes in various industries and end-markets. They have been using BPC for over 10 years to help manage their global planning, consolidations and reporting requirements. Hear from Raj Gupta, Flex's Director of IT Finance about their journey with BPC, and lessons learned as they have expanded their use of BPC to support over 2,000 users worldwide across multiple business segments.

**Time:** 11:00 am - 11:50 am

**Presenter(s):** Rajnish Gupta - Director of IT Finance, Flextronics



**Title:** **Roundtable: Maximize the Value from Your investment in BPC**

**Description:** EPM projects can require a significant investment in resources for any organization. Attend this session to find out how to structure the intended ROI to be a reasonable goal...and ensure you achieve that outcome. Here from current BPC customers what they have done internally to help maximize value from their investment.

**Presenter(s):** Scott Kolka, Steve Sussman, David Den Boer

**Time:** 12:00 pm - 12:50 pm

**Title:** **BPC Web: Reports & Input Forms**

**Description:** Leverage reports and input forms created in BPC Web for greater end user ease of use, as well as simpler navigation in conjunction with Business Process Flows (BPFs).

**Presenter(s):** Jennifer Harlan

**Time:** 1:30 pm - 2:30 pm

**Title:** **Important EPM Functions in Reporting**

**Description:** Learn how to make your reports more transparent and dynamic by utilizing report functions such as EPMFullContext, EPMCopyRange, EPMReportOptions and EPMAxisOverride.

**Presenter(s):** Jennifer Harlan

**Time:** 2:30 pm - 3:30 pm

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## SESSION DESCRIPTIONS

### Room #1 (continued)

**Title:** **Fundamentals of Metadata**

**Description:** Better understand dimensions – the building blocks of report creation – and the reporting and performance implications of adding properties and hierarchies.

**Presenter(s):** Jennifer Harlan

**Time:** 3:30 pm - 4:30 pm

### Room #2

**Title:** **Logic Approaches Overview**

**Description:** This session will review all of the different types of logic available in BPC including appropriate use of each type, benefits & drawbacks, as well as optimization approaches & techniques.

**Presenter(s):** Scott Kolka + Mike Sullivan

**Time:** 10:00 am - 10:50 am

**Title:** **Roundtable: BPC Performance Issues**

**Description:** Sometimes finding an answer to your BPC performance question can be like hunting for a needle in a haystack – time consuming and often frustrating. Column5's CEO as well as the Director of Technical Services will be hosting an open forum to get all of your BPC performance questions answered. This session will be an open dialog among customers exchanging ideas about their BPC Performance issues.

**Presenter(s):** Charles Dagaev + David Den Boer

**Time:** 11:00 am - 11:50 am

**Title:** **Case Study: How New Balance Athletics Continues to Leverage BPC to Meet their Evolving Financial & Management Reporting Needs \***

**Description:** New Balance has been using SAP BPC since 2010. Join Todd Paulauskas, New Balance's Financial Information Systems Manager, to hear the reasons why BPC was originally selected, how they have been using BPC to manage a variety of planning and reporting requirements, their recent upgrade to v10, and plans for continued expansion. Gain insights into lessons learned as New Balance has grown as an organization and needed to rethink how BPC would be utilized to support the increased complexity in their business.

**Presenter(s):** Todd Paulauskas, New Balance

**Time:** 12:00 pm - 12:50 pm

*\*Session presented by a remote speaker.*



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## SPEAKER BIOS



### **Ivo Bauermann**

Global Vice President & General Manager of EPM & ERP Financials, SAP

Ivo is a senior software executive with more than 20 years of international experience in analytics, finance and enterprise performance management solutions. He currently leads the global EPM & ERP Financials initiatives at SAP. Ivo is a motivational leader with experience leading and building global teams delivering business results, customer success and innovation. He is also one of the key initiators of SAP's new cloud analytics solutions.



### **David Den Boer**

CEO, Column5 Consulting

David Den Boer founded Column5 Consulting in 2005. A dedicated professional services practitioner and entrepreneur, he has applied his significant technical delivery experience and broad experience providing solutions across a wide variety of industries — and raising the standards for what success means within EPM. As a founding principal with the launch of Column5, David sought to extend the focus of EPM beyond just implementing technology, assembling a team of business process visionaries and senior product talent with unmatched ability to deliver world-class EPM solutions. Under David's leadership, Column5 has evolved beyond its reputation for technically superior solutions to be an influential global provider of high-value EPM solutions. His prior experience includes consulting experience as Director of Services at OutlookSoft from 2000 to 2005.



### **Jennifer Harlan**

Global Director of Training, Column5 Consulting

Jennifer Harlan directs the EPM Academy, Column5's formal training practice. She has 20 years of experience in the EPM industry, including 8 years at Hyperion and 4 years at OutlookSoft/SAP. Jennifer's skillset combines innovative curriculum development and engaging training delivery, leveraging best-in-class tools to develop customer-centric and industry-specific EPM training for consumption via on site classroom, virtual classroom, and online independent eLearning. She has developed EPM training programs for all audiences and industries, as well as delivering over 400 dynamic live training sessions.



### **Ty Jessup**

Director of Solutions, Column5 Consulting

Ty has over 29 years of experience working with Enterprise Performance Management solutions as a customer and a consultant. For the past 12 years, Ty has focused his efforts primarily on BPC and SAP's EPM Solutions, having worked for OutlookSoft and Column5. Ty has been at Column5 since 2006 and has contributed to the successful implementations of some of Column5's largest customers. In his current role as the Director of Solutions, Ty leads a team that is focused on supporting sales by helping both new prospects and existing customers see the value and benefits of the combination of SAP's EPM Solutions and Column5's Consulting Expertise.

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## SPEAKER BIOS



### **Scott Kolka**

Director of Services - West, Column5 Consulting

Scott has over 18 years of experience selling, implementing, designing and leading Enterprise Performance Management systems across a wide array of industries. He manages the Delivery practice for the Western United States, comprising of 30+ consultants and 12-15 active engagements at any given time. He provides oversight, design expertise, hands-on consulting and customer leadership. Scott is able to provide both specific product and design expertise based on leading practices and can provide a vision for customers on planning and executing an EPM strategy.



### **Chris Clay**

Product Management, SAP

Chris Clay is a member of the Enterprise Performance Management (EPM) solution management team. In his role he is responsible for planning future product releases, ensuring the success of EPM partners and customers, and enabling the sales organization to effectively position the solution suite. Chris has nearly a decade of solution/product management experience in the EPM industry and has contributed to the planning, development and release of a multitude of solutions.



### **Rajnish Gupta**

Director of IT Finance Solutions, Flex

Rajnish Gupta is the Director of IT Finance Solutions at Flex. He has spent 12+ years at Flex working in a variety of roles in the Finance and Finance IT organizations. Rajnish is a graduate from University of Colorado at Boulder's distinguished Leeds School of Business.

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## **REMOTE SPEAKERS BROADCASTING LIVE FROM BOSTON!**



### **Charles Dagaev**

Global Director - Technical Services, Column5 Consulting

Charles began his SAP BPC career with exposure to the software in 2001 with OutlookSoft, the original creator of the BPC, and worked at SAP until 2008 when he came over to Column5. He is certified as both an Application and Technical Consultant for the software, having performed over 1000 technical implementations of the BOBJ Analytics software products across every different business vertical worldwide over the past 14+ years. He currently runs the Global Technical Services group at Column5 with a team of SAP Analytics (EPM/EIM/BI/HANA/NW/BW/MS) resources, all of whom have been the Subject Matter Experts (SME) in the numerous areas of the aforementioned software including NetWeaver, HANA, and Microsoft technology stacks.

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## SPEAKER BIOS



### **Mike Sullivan**

VP of Delivery, Column5 Consulting

Mike is a seasoned professional with over 19 years combined experience in requirements gathering, needs analysis, EPM solution design, EPM solution delivery, and knowledge transfer related to EPM and Business Intelligence Applications. As VP of Planning and Consolidation, he oversees Column5's Regional Delivery Managers. Mike was a former Services Director with OutlookSoft, where he worked from 2000 to 2006. The hallmark of Mike's skill set is the combination of strong business acumen and deep technical skills which enable the translation of business requirements into system design and innovative solutions. Mike also has a long-standing history of successful implementations and satisfied customers across multiple industries using multiple products – over 100 with SAP BPC alone. Mike is a CPA with a strong background in Accounting and specializes in Consolidations and Driver Based Planning.



### **Adam Hess**

EPM Curriculum Developer & Trainer, Column5 Consulting

Adam is on Column5's SAP EPM Curriculum Developer and Trainer. With over a 100+ classroom deliveries, Adam knows how to design, develop, and deliver live and virtual classroom environments. His current training and eLearning development expertise includes SAP BusinessObjects Planning and Consolidation 10 and 10.1 (Reporting and Administration) for both Microsoft and NetWeaver versions. He has been with Column5 since 2014.



### **Todd Paulauskas**

Financial Information Systems Manager, New Balance Athletics

Todd is the Financial Information Systems Manager and is responsible for the company's BPC solution in terms of architecture, implementation, support, training, and maintenance – all in both a functional and technical capacity. He has been working in finance and financial information systems for more than 22 years. Todd has been with New Balance for 8 years, and prior to that worked for Bose Corporation and TE Connectivity, where he held various finance as well as business process analysis roles, and served as an SAP FI/CO functional/technical lead in multiple, global SAP ERP implementations.



### **Steve Sussman**

VP - Sales & Marketing, Column5 Consulting

Steve Sussman oversees Column5's global sales, business development and marketing initiatives. He has over 20 years of experience in the EPM industry, including time with Hyperion and OutlookSoft/SAP in sales and marketing roles. Steve delivers a wealth of experience through his educational, consultative approach. His ability to partner with executives from global organizations plays a vital role in helping transform their companies. Under Steve's direction, Column5's sales team focuses on educating clients to appreciate sources of value.