

October 2019



The Association of Accountants and Financial Professionals in Business

DALLAS FORT WORTH AREA CHAPTER

# THE F.A.N. FINANCE & ACCOUNTING NEWS YOU CAN USE

## CHAPTER MEETING

When: October 17, 2019 12:00 PM to 4:30 PM

Where: DoubleTree by Hilton Dallas Near the Galleria

**Why Budgeting Processes Fail...And How Your Company Can Use Forecasting and Other Techniques to Become Future Ready** / Steve Player, Program Director, Live Future Ready



Objectives:

- \* Understand common flaws in traditional budgeting processes
- \* Learn advanced approaches: driver-based rolling forecasts, dynamic action plans

**Field of Study:** Accounting      **Prerequisites:** None

**Using Analytics to Drive Higher Returns** / Jim Rushton, Author and Co-Founder of Armeta Analytics

Objectives:

- \* Explosion of analytic data
- \* Ensuring analytic projects have positive return on investment

**Field of Study:** Other      **Prerequisites:** None



**Growing through Mergers and Acquisitions** / Adrien Dubourg, CMA, CPA, Operational Transaction Services - Manager, EY

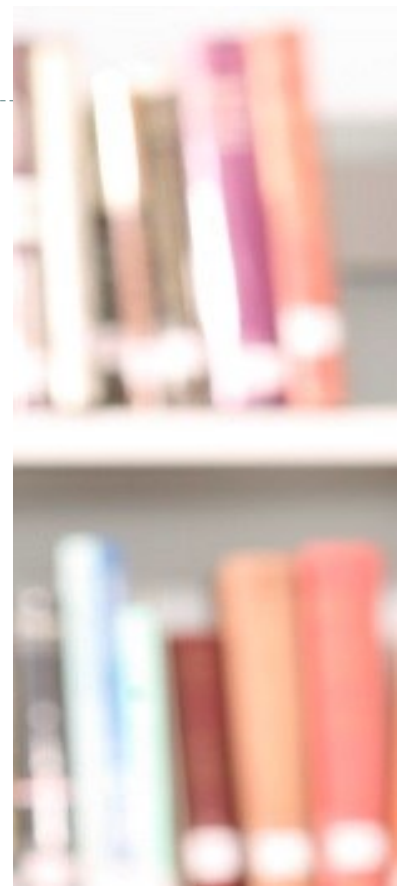


Objectives:

- \* Challenges around planning & execution of mergers and acquisition
- \* Impact on employees, systems, and financial reporting

**Field of Study:** Accounting      **Prerequisites:** None

For more information and to register click [here](#).



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### CHAPTER DATES TO REMEMBER

- October 17—Chapter Meeting—12noon - 4:30 PM  
Business Planning and Analytics  
DoubleTree Dallas Near the Galleria
- October 24—Networking Happy Hour  
Lazy Dog Restaurant & Bar, Dallas
- November 16—Community Service Project  
Salvation Army Angel Tree, Galleria Mall
- November 21—Chapter Dinner Meeting  
DoubleTree Dallas Near the Galleria
- November 23—Community Service Project  
Salvation Army Angel Tree, Galleria Mall
- January 16—Chapter Dinner Meeting  
DoubleTree Dallas Near the Galleria
- February 20—Chapter Dinner Meeting  
DoubleTree Dallas Near the Galleria

## Dallas Fort Worth Area IMA Networking Happy Hour

The next Networking Happy Hour will be October 24<sup>th</sup> at Lazy Dog Restaurant & Bar, 5100 Belt Line Rd #500, Dallas. For more information or to register [click here](#).

The event starts at 5:30 pm and goes until 8:00 pm. Appetizers will be served; drinks are on you.

This is a great opportunity to meet fellow members of the IMA, as well as other DFW accounting and finance professionals and recruiters in a relaxed, fun setting.

We look forward to seeing you there!

### Congratulations New CMAs

Mr. Shuo Yuan, CMA

Ms. Candace Cavallo, CMA

Miss Wei Guo, CMA

Mr. Michael Scott Garner, CMA

Qiyue Ying, CMA

James A Ramsey, CMA

Timmy Paul, CMA

Mr. Mark John Merki, CMA

Ms. Jiali Cao, CMA

Kevin Hennessey, CMA

Mr. Richard Bollar, CMA

Congratulations Terri Chepregi!. Terri wrote a review, “*Leading When It Matters Most*” and it was selected for publication. It was included in the September issue of “Strategic Finance”. Terri has been a member of our IMA chapter for over 20 years.

**Terri Chepregi**, CMA, CPA, is the controller for the Recovery Resource Council. You can reach her at [t.chepregi@recoverycouncil.org](mailto:t.chepregi@recoverycouncil.org).

### IMA Membership Anniversary

Mr Peter A. Robbins, CMA - 25 Years

## OCTOBER DALLAS FORT WORTH CHAPTER MEETING

The Dallas Fort Worth Area IMA Chapter will meet Thursday, October 17th at the DoubleTree by Hilton Dallas Near the Galleria, 4099 Valley View Lane, Dallas

- 12:00 PM Registration/Lunch/Announcements
- 12:45 PM Why Budgeting Processes Fail...And How Your Company Can Use Forecasting and Other Techniques to Become Future Ready by Steve Player, Program Director, Live Future Ready
- 01:35 PM Break
- 01:45 PM Using Analytics to Drive Higher Returns by Jim Rushton, Author and Co-Founder of Armeta Analytics
- 02:35 PM Break
- 02:45 PM Growing through Mergers and Acquisitions by Adrien Dubourg, CMA, CPA, Operational Transaction Services - Manager, EY
- 03:35 PM Break
- 03:40 PM Panel Discussion with Steve Player, Jim Rushton, and Adrien Dubourg
- 04:30 PM Adjournment

Four (4) CPE hours for both CMAs and CPAs are provided. **Attendees must sign in and out and be present for the presentation in order to receive CPE credit.** CPE certificates will be sent in an email to those who have met the requirements.

Dallas Fort Worth Area IMA is a registered CPE sponsor with the Texas State Board of Public Accountancy (TSBPA). This registration does not constitute an endorsement by the board as to the quality of our CPE program.

Registration by **12:00 Noon, Monday, October 14<sup>th</sup>**

[Register](#)

**Cancellation**, please e-mail [reservations@dallasima.com](mailto:reservations@dallasima.com) as soon possible. Refunds will not be made for cancellations made after 12:00 noon on Monday, October 14<sup>th</sup>. If you do not cancel prior to the deadline, you will not receive a refund for the event. You may alternatively send someone in your place by notifying [reservations@dallasima.com](mailto:reservations@dallasima.com)



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## OCTOBER CHAPTER SPEAKERS



### Congratulations to our Scholarship Winner

**Sanjari Chelawat**

### Walter Massie Memorial Scholarship Fund

The chapter scholarship utilizes the IMA MEF Scholarship application. The 2020 Scholarship application is now online on the IMA website. Apply [here](#).

#### Local Scholarship Eligibility

- A. To be eligible, applicants should be enrolled in a higher educational institution and should be:
1. Children of Dallas Fort Worth Chapter members enrolled in higher education institutions, or
  2. Members of student groups sponsored by the Dallas Fort Worth Chapter, or
  3. Student members of the Dallas Fort Worth Chapter,
  4. Regular members of the Dallas Area Chapter.

**Steve Player** serves as the North America Program Director for the Beyond Budgeting Round Table (BBRT) and works with BBRT member companies to implement continuous planning processes. He has over 30 years experience with improving performance management and implementing strategic planning processes. He is also the Managing Director of Beyond EPS Advisors, a Business consulting firm, and founder of ABM SMART.

He is the co-author of *Future Ready: How to Master Business Forecasting and Beyond Performance Management* as well as five other books. He writes the "Finance Transformation" column for *Business Finance Magazine* featuring CFO interviews from leading organizations on innovative finance and planning processes.

**Jim Rushton** began his career in analytics working with some of the biggest consulting companies in the world, including Accenture, Deloitte Consulting, and IBM Global Services. Jim then moved to an executive position with Verizon, where he oversaw the company's customer and a marketing information. Leveraging his experience across corporate America, he helped found Armeta Analytics, and in the past decade, his team has helped dozens of Fortune 1000 companies learn how to monetize their data. Jim built his career with the traditional "Big Six" Consulting Firms before taking a Corporate role with Verizon where he managed a team of 65 professionals and over 100 support staff along with a \$42mm annual budget to manage and optimize 100% of all campaign management and direct marketing activities (over 250 million contacts annually) across both residential (over 150 million households) and business-to-business (11.5 million businesses),

resulting in lowered cost per gross add, increased revenue and decreased churn. New systems and processes drove upwards of \$600 million in net new incremental sales annually. He then took his learnings from Verizon and help found Armeta Analytics, a boutique analytics firm that has assisted companies such as Neiman Marcus, QuikTrip, TXU Energy and AMEX monetize their data for game changing results.

In his spare time, Jim likes to spend time outdoors collecting rocks for a hand-built stone chapel, eating Texas' famous smoked brisket, and watching the sunset.

**Adrien Dubourg** is a CMA and CPA in the State of Texas. Adrien has over 6 years of experience in management consulting serving large complex and international engagements in the area of finance/FP&A transformation, system implementation (Oracle Hyperion, SAP), functional support, organizational design, governance, reporting & analytics / digital. Prior to joining EY, Adrien worked for over 10 years in the pharmaceuticals/life sciences and financial services industry, leading various Finance leadership roles in Europe and North America. Responsibilities included enterprise performance management, corporate finance, reporting and consolidation, project management, strategy and business development interacting directly with C-level Executives.

He has 2 young boys and is from France. He enjoys indoor and outdoor cycling, yoga, golf and travelling. He's very competitive and likes mentoring younger people to be successful. His mantra: it's all about the skills and intellectual curiosity not the title and money.

## Reconcile your resume and Linked In Profile to match your desired outcome.

It never ceases to surprise me how a person's resume barely reflects their current job and especially their Linked In profile. Furthermore, people are surprised when it is pointed out to them. "I hear you want to be an Accounting Manager, and you have relevant experience, but it's not reflected in your resume."

As part of your ongoing career management, treat your resume and Linked In profile as *living documents*. Each time you have an accomplishment at the office, open your Word doc, and happily add your new achievement. If you have not had one lately, take the initiative and take a course so you can offer more to your job and team at the office. ([www.Udemy.com](http://www.Udemy.com) is a great place to start with affordable courses.) It will make you more confident too.

Treat your Linked In profile the same way as your resume, i.e., Let's say you streamlined a process at the office? Add it to your profile. You were awarded a certification, add it to your profile. Lastly, companies use Linked In to check for consistency. It is a good idea to have a professional picture and include a link to your Linked In profile on your resume. Plus a good Linked In profile will attract recruiters to you.

Now that you have reconciled what you really do to what is in your resume, here are a few tips when applying for jobs.

*Do not use header and footers or PDF's.* Depending on the ATS (Applicant Tracking System, otherwise known as the black hole when applying for jobs) used by companies, these cannot see all the information and an old one might just kick you out.

As an example, sometimes someone's resume comes across with no name or contact information and manually must be reviewed. You can bet companies are not looking at individual resumes to find your contact information.

Speaking of formatting, leave it out! Make your resume easy to read, For example, **Bold your employers and dates**, use spell check, and have a friend look at it, spell check does not always know the proper use of here vs. hear.

Getting back to accomplishments, be specific when listing these vs. just a generic "list of things you do each day."

We all spend countless hours at the office. Take an inventory of your day-to-day tasks and hopefully, a list of accomplishments. If your column of accomplishments is in the negative, ask your supervisor what you can do to add more value.

**Mary Ann Markowitz is Past President for The Dallas Fort Worth Area Chapter; she assists with speakers and is owner of Mary Ann Markowitz & Associates Recruiting and Career/Life Coaching.**

[www.mamrecruiting.com](http://www.mamrecruiting.com) [www.maryannmarkowitz.com](http://www.maryannmarkowitz.com)

## FREE CPE WEBINARS

Free NASBA and TSBPA  
Approved High Quality CPE Webinars Available for IMA Members

Take advantage of IMA's Free (to IMA Members) High Quality CPE (NASBA Approved) Inside Talk, Leadership Academy, and Strategic Management Series Webinars. Register at [IMAnet.org](http://IMAnet.org)

### Inside Talk

Our highly popular series on timely, emerging issues and relevant topics such as technology, data analytics, revenue recognition, expense reporting and continuous accounting.

- ◇ October 01, 2019 (12 noon)  
**From accounting-speak to plain English: Practical tips** (1.0 CPE)
- ◇ October 08, 2019 (12 noon)  
**The Productivity Imperative: Optimizing the Business in all Economic Conditions** (1.0 CPE)
- ◇ October 16, 2019 (12noon)  
**How to Accelerate and Optimize Your Close** (1.0 CPE)
- ◇ October 30, 2019 (12 noon)  
**T&E Trends and Best Practices in the Digital World** (1.0 CPE)
- ◇ November 06, 2019 (12 noon)  
**Top 5 Factors in Implementing a New ERP System** (1.0 CPE)

### Leadership Academy

Monthly webinar series that empowers entry- and intermediate-level management accountants to become leaders within the profession.

- ◇ October 08, 2019 (12 noon)  
**Personal and Professional Life Balance** (1.5 CPE)
- ◇ November 05, 2019 (12 noon)  
**Time Management**
- ◇ December 03, 2019 (12 noon)  
**Male/Female Communication: Building Collaborative Relationships**

### Strategic Management

A series of engaging webinars that focuses on various elements of strategy and competitive analysis that is of importance and interest to management accountants.

- ◇ October 21, 2019 (12noon)  
**Leadership Driven Strategy: For High-Performance Teams** (1.0 CPE)

## Texas Council Corner

The Council is comprised of the five Texas IMA Chapters – Austin Area, Dallas Fort Worth Area, El Paso, Houston and San Antonio.

The next Texas Regional Council meeting will be October 26<sup>th</sup>.

For more information, go to [texascouncil.imanet.org](http://texascouncil.imanet.org)

### **Help IMA advance the Student Ambassador Program**

How can you further help IMA increase its awareness on campuses across the US? Have an IMA Student Ambassador serve on your chapter's board! IMA Student Ambassadors are the go-to experts on the IMA and CMA for their peers and schools. By serving on the board, ambassadors will gain the leadership and networking experience needed to successfully execute their mission of educating their peers on all things IMA, CMA, and your chapter.

### **Check out IMA's Podcast**

In July, IMA launched its podcast series "Count Me In," which will feature the latest perspectives on accounting and finance from industry experts with topics including emerging technologies, business innovation, and the future of the profession. Nine episodes have already been published and the subscriber list is rapidly growing! You can read more about the podcast in our press release [here](#) and to listen to the episodes, visit the podcast website [here](#).



## Are you an influencer?



IMA's Campus Influencers program offers students insights on careers, including the variety of career paths in accounting and finance as well as how IMA and the CMA certification can support and strengthen their careers. Learn more at [sfmagazine.com](http://sfmagazine.com).

The Dallas Fort Worth Area Chapter is looking for members willing to help reach out to area universities to share information on management accounting as a career, student resources available from IMA, and the CMA. If you are interested or need more information, contact [Jimmie Smith](#).

### Dallas Fort Worth Area Chapter Members Serving at Texas Council

- Treasurer – Laurie Burney

#### The Global Level

- Global Board of Directors—Pay Wynn
- Former Chair/Global Board – John Macaulay
- Planning and Development Committee – John Macaulay
- Member Relations Committee—Pat Wynn
- Leadership Academy Member - Pat Wynn
- Stuart Cameron McLeod Society (SCMS) President – Pat Wynn
- SCMS Vice President – MaryValerie Reeves
- Committee on Ethics—Gerald Ratigan / Lesley Swain
- Diversity and Inclusion Advisory Committee – Jimmie Smith
- Technology Solutions & Practices Advisory Committee—Daniel Smith

## WELCOME TO OUR CHAPTER

### Welcome New IMA Members

- Vijay Raj
- Michelle Cambra
- Ms. Erika Morgan
- Mr. Lawrence Charles Cole, Sr.
- Mrs. Shruthi D M
- Shengyun Xue
- Mrs. Wendy Pritchett, Student
- Emily Hoffer
- Susanna M Sims
- Kristy Finn Shoffner
- Krisna Patel
- Andrew Ray Ortiz

### Welcome Transfers from Other Chapters

- Mr. Daniel Michael Decorte
- Alexiana Jimenez

## Upcoming IMA Events

- October 17—4 hour Seminar/Meeting Business Planning and Analytics: Learning & Growing to Live Future Ready (12:00 noon – 4:30 PM) [Why Budgeting Processes Fail...And How Your Company Can Use Forecasting and Other Techniques to Become Future Ready](#) - Steve Player, Managing Partner, The Player Group, Program Director, Live Future Ready; [Using Analytics to Drive Higher Return](#)- Jim Rushton, Author and Co-Founder of Armeta Analytics; [Growing through Mergers and Acquisitions](#) - Adrien Dubourg, CMA, CPA, Operational Transaction Services - Manager, EY; Panel Discussion with All Speakers
- October 24— Networking Happy Hour (5:30 - 8:00 PM), Lazy Dog Restaurant & Bar, 5100 Belt Line Rd #500, Dallas
- November 21- Dinner Meeting (5:30 - 8:30 PM) - CMA Ethics – A Case Study

## [Gleim CMA Review](#)

As a proud IMA Strategic Partner and the review candidates have trusted since 1981, Gleim CMA is offering IMA Chapter members 25% off the Gleim Premium CMA Review.

Gleim CMA's mission is to help candidates pass their exams with confidence on the first try. We achieve this goal by working with the IMA to support candidates and provide everything future CMAs need to pass including:

- Realistic, exam-quality practice questions
- Expert and educator-led videos
- Comprehensive coverage of the ICMA's Content Specification Outlines
- Our Proven, stress-free study method
- Personalized and reliable candidate support
- And much more!

If you have questions or concerns about this offer, contact Alexandra Graham, [alexandra.graham@gleim.com](mailto:alexandra.graham@gleim.com), 1-800-874-5346 ext 428.

Orders can also be placed online at [Gleim.com/IMAChapter](http://Gleim.com/IMAChapter) or by using your chapters custom ordering link.

Thank you to our Chapter Sponsor



[www.mamrecruiting.com](http://www.mamrecruiting.com)



## 2019-20 Chapter Leadership Team

### Board Members - Officers and Directors

President	Nikki Thirasant-Meyer
Secretary	Noel Kaiboni
Treasurer	Joe Lee
Administration Team Lead	Joe Baze
Director, Meeting Arrangements	Elisabetta Mroski
Director, Member Attendance	Chris Boike
Communications & Public Relations Team Lead	MaryValerie Reeves
Professional Education Team Lead	Jimmie Smith
Director, Academic Relations	Jimmie Smith
Director, Young Professionals	Rory Guthrie
Director, Young Professionals	Chris Carr
Director, CPA CPE Compliance	MaryValerie Reeves
Membership & Marketing Team Lead	Martha Gibson
Director, Corporate Development	Jimmie Smith
Texas Council Delegate	Joe Baze
Texas Council Delegate	Nicole Thirasant-Meyer

### Team Members and Coordinators

Community Service Coordinator	NingNing Mei
Education	Mary Ann Markowitz
Employment Coordinator	Lorna Winston-Blanks
Networking Events Coordinator	Rory Guthrie
Networking Events Coordinator	Athena Trentin
Webmaster	Stephanie Carpenter
Director	James Chamberlain

### Long Range Planning Committee

Chair, Long Range Planning Committee	Joe Baze
Member	Stephanie Carpenter
Member	MaryValerie Reeves
Member	Jimmie Smith
Member	Nikki Thirasant-Meyer

## IMA 'S VISION

To be the leading resource for developing, certifying, connecting, and supporting the world's best accountants and financial professionals in business

## **October Chapter Meeting Change: Different time and Format / More CPE**

Plan to attend the Business Planning and Analytics meeting on October 17th. Registration starts at 12:00 noon. Lunch is provided. There will be three sessions (Budgeting and Forecasting, Data Analytics, and M&A Operational Overview) followed by a panel discussion with all speakers. For more information click [here](#).



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