



From **Ledgers** to **Leadership**

**A Journey through
the Finance function**

12 July 2012, Park Plaza Hotel, Lahore
13 July 2012, Sheraton Hotel & Towers, Karachi
9:00 am - 5:00 pm



...Only from Octara!!!



M. Ali Saeed

- Chief Executive Officer at an Investment Banking / Equities Brokerage firm
- Over 10 years of diverse professional experience in foreign and domestic equity markets specializing in buy and sell side roles
- Former emerging markets strategist with Morgan Stanley Capital, UK

Ali Saeed's professional experience converges from over 10 years of diverse indulgence in the fields of portfolio management and institutional / retail sales of equities to domestic and foreign market participants.

He is currently the CEO of a leading investment banking and equities brokerage firm operating at the Karachi bourse. His responsibilities have encompassed a wide range of roles from effectively marketing the firm to domestic, retail and corporate institutions and also managing the entire settlement cycle. He has also been engaged in sell side research and economic analysis. Ali's previous assignment was at a leading Asset Management Company where he led the portfolio and research efforts of the firm managing three funds with an asset base of PKR 7 billion. Prior to that, Ali was actively monitoring and investing in the far eastern markets at Morgan Stanley Capital in London researching and managing emerging markets in the Asia-Pacific rim. Early in his career, his concentration in research efforts have paved the way for over 50 research reports and business journal articles regularly published and distributed to domestic and international clients.

Currently, Ali is authoring a book on PPP (Public Private Partnerships) with a Boston based consultant. His association with academia has allowed him to currently pursue his M.Phil in Economics. He holds a MSc. in Finance & Economics from the prestigious Graduate School of Business at the University of Strathclyde in Glasgow, Scotland and a Bachelors in Business & IT from the Curtin Business School at the University of Curtin, in Australia. He has attended various international conferences and workshops to enrich his own pool of thought.

Ali is renowned for his highly engaging, thought provoking and practical approach towards coaching and mentoring professionals. Off the corporate floor, Ali is also a regular visiting faculty member at leading universities in Karachi.

Ali has trained participants from



Here's what past participants say about Ali Saeed:

"Fine tuned many key areas of valuation and analytics. It was a great learning experience with Ali."

Imran Nasar, Budget & Planning Manager, Tapal Tea

"My understanding of financial concepts improved significantly. Overall it was an excellent course to be enrolled in."

Maha Qasim, Business Analyst, Engro Corp.

"Actual scenarios and modeling numbers from financial statements combined with best international investment theories was the greatest part of the training. Good job. Keep it up!"

Syed Rehan Raza, Investment Banking Analyst, MCB

"Highly practical! Ali's knowledge and enthusiasm for the subject was remarkable."

Bilal Ahmed Leghari, Senior Internal Auditor, PPL



Nadir Jamal

(Guest Speaker)

Nadir is a Chartered Accountant by profession having more than 30 years of post qualification experience.

His last assignment was with a leading multinational company Reckitt Benckiser Pakistan Limited as Finance Director and Company Secretary. He was also member of the Management Committee and Board of Directors. Because of his achievements, he was recognized as one of the best five Finance Directors of Reckitt Benckiser worldwide. His commercial acumen is a specialty and has been involved in all spheres of business. His previous assignments include heading the finance function of Ddex Eternit Limited and Mohammad Farooq Textile Mills Limited.

Nadir has conducted various in-house trainings which are aimed to create alignment, awareness and ownership on organizational vision, mission and values and connecting individuals to their infinite potential for personal and corporate gains. He excites peoples imagination, leverages the power of human passion and inspires them to strive for extra ordinary achievements. His uniqueness is to be able to relate with the participants, be practical (rather than theory) and to be able to explain complicated and complex concepts and business scenarios in simple terms and by live simulations and examples.

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The Program:

Finance transformation and the shift in finance towards value creation is responsible for the changing needs of organizations and the changing requirements of its people. Identifying the type, developing and then maintaining these changing skills and competencies is the priority for finance professionals. Today's world is interactive and interdependent. New technology, new methodology and new processes are making inroads in our day to day life. It is important to keep abreast of these changes and how these changes are impacting our workplace and life. Today's expectations in terms of deliverables are different than those of yester years. Functional excellence in sync with business partnering is the name of the game.

The workshop aims to give an understanding as to what is expected of a finance professional, the competencies needed and how to excel in today's changing environment leading to achievements of business objectives and goals. Furthering finance is a key question and if you consider functional excellence, it is clear that you need to create an environment which provides people with the opportunity to continuously improve on the core capabilities of the finance function. However if you do that in isolation, it will lead in the end to further isolation, which is the opposite of what is needed in order to make sure that the finance function caters to the business' needs. Ultimately, finance and business are not two separate parts, but actually integral elements of a well functioning company.

Top 6 Learning Outcomes:

- Understand the changing role of finance
- Understand the concept of business partnering.
- Understand the business and technical competencies needed.
- Deliver business results in this rapid changing environment
- The human aspect of the evolution
- Skill sets required to become a true financial professional

Key Rationales:

- The vantage point on strategy
- Understanding what "ticks" for the business concern
- Combining strategy and finance to apply leadership
- Leadership traits required for finance professionals in the modern day era

Ideal Candidates:

All finance professionals – across all finance role types – will require technical and better business and commercial skills going forward to provide the value that organizations expect from the finance function of the future.

Course Agenda:

Financial leadership an illustrative continuum:

- ▶ The overlapping between "strategy" and "finance"
- ▶ Must have skills and differentiators
- ▶ Key styles and attributes
- ▶ Gender diversity
- ▶ The **six top tips for success!**

A decade of change – the evolution to value creation:

- ▶ Dual focus - the shift to **value creation**
- ▶ Transformation – The role of a leader vs The role of a **finance leader**
- ▶ The future: The skills and attributes for the future environment
- ▶ The true meaning of "Leadership"
- ▶ The Six **Roles of Financial Specialists**
- ▶ Leadership styles and its adaptive nature

Business Partnering:

- ▶ Types of changes
- ▶ Motive for change
- ▶ The top six changes required
- ▶ Business competencies
- ▶ Technical competencies

Live Business / Simulation:

A live business simulation shall be conducted which will depict to the participants the changing role of finance - moving from ledger to leadership / business partnering. It will highlight why the change is needed and what are the competencies required these days to adopt to the changing role of finance.

- ▶ Understand why change is required
- ▶ Understand the difference of **ledger**, leadership and **business partnering**.
- ▶ Understand the competencies needed
- ▶ Understand the influence of modern processes, technology and how to leverage it

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Workshop Investment

PKR **12,500/-** per participant

10% Group Discount on 2 or more nominees

Course material, Octara certificate, lunch, refreshments & business networking

5 Easy Ways to Register



021-34534261
021-34520092



Octara Private Limited
2/E-37, Block-6,
P.E.C.H.S., Karachi.



021-34520708



register@octara.com



www.octara.com

Send your cheque in favor of **"Octara Private Limited"**

To: **Muhammad Imran Anwer** Octara Private Limited,
2/E-37, Block-6, P.E.C.H.S., Karachi.

Tel: 021-34534261, 021-34536315, Cell : 0321-2670041

Octara Cancellation Policy

Our Cancellation Policy is activated as soon as the duly filled signed & stamped Octara Registration Form is received from the client. Cancellations made at least 10 working days prior to the course will be refunded in full. If a booking is cancelled 10 to 7 working days before a course, a Cancellation Fee of 25% of the course fee is payable. For cancellations made within 7 working days, no refunds can be given. Cancellations must be confirmed by letter, fax or email. Substitutions may be made at any time. Notwithstanding the above, delegates may transfer to another course to be run within 6 months. Variance in the course fee will be invoiced or adjusted accordingly.

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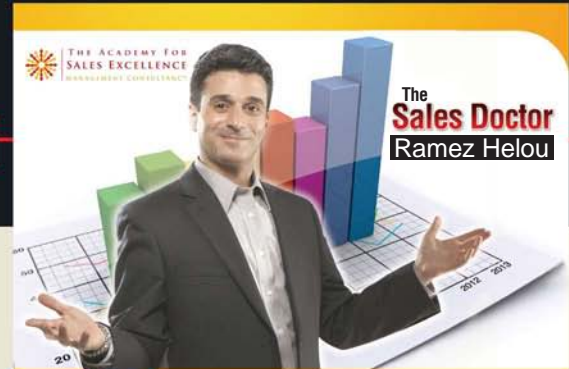
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The
Sales Doctor
Ramez Helou

Systematic Key Account Management

11 - 12 July 2012, Sheraton Hotel & Towers, Karachi
9:00 am - 5:00 pm

Course Director:
Ramez Helou

CEO and Founder, **The Academy for Sales Excellence**

Former Head of Sales and Business Head at Unilever Food Solutions
in the Gulf countries

Former Regional Sales Training Manager for Asia, Africa & Middle East at
Unilever Food Solutions

Trained and inspired more than 50,000 professionals in 20 countries on 4 continents

More than 21 years of field experience of B2B and B2C strategies

Author of Unilever Food Solutions' Global B2B Sales Training Program
implemented across the world

Top 6 Learning Outcomes:

- Understand the buying process and influencers involved in it
- Define the hierarchy of needs of the client and the **stages** of the
Key Account Relationship Development Continuum
- Structure the **engagement strategy** and **contact matrix**
- Analyze macro and micro environment to **structure optimum
customer opportunities**
- Develop the Key Account relationship plans and activities
- Create **action plans** and accountabilities

Ideal Candidates:

Key account managers, sales managers, sales directors and other
"C" level executives that are involved in Key Accounts and customer
engagements will greatly benefit from this course.