FINANCIAL EXECUTIVE AND INTERNAL AUDITING CONFERENCE
MAY 3-6, 2015

SPEAKER GUIDELINES

TIPS FOR PREPARING AND PRESENTING AN EFFECTIVE PRESENTATION OR WORKSHOP

TIPS FOR COMPLETING THE CADMIUM CONFERENCE HARVESTER

SPONSOR OVERVIEW:

Food Marketing Institute (FMI) conducts programs in public affairs, food safety, research, education and industry relations on behalf of its nearly 1,250 food retail and wholesale member companies in the United States and around the world. FMI's U.S. members operate more than 25,000 retail food stores and almost 22,000 pharmacies with a combined annual sales volume of nearly $650 billion. FMI's retail membership is composed of large multi-store chains, regional firms and independent operators. Its international membership includes 126 companies from more than 65 countries. FMI's nearly 330 associate members include the supplier partners of its retail and wholesale members.

CONFERENCE OBJECTIVE:

Designed exclusively for and by financial leaders and internal auditors in the grocery industry, the co-located FMI Financial Executive and Internal Auditing Conferences provides formal and informal learning opportunities for financial executives and internal auditing professionals to increase professional knowledge and develop a focused approach towards identifying and addressing current and future financial and auditing challenges in the food retail industry.

ATTENDEE PROFILE:

Internal Auditing

> Vice Presidents, Managers and Store/Corporate Auditors involved in:
> • Internal Audit
> • Finance
> • Compliance
> • A/P Auditing
> • Loss Prevention
> • Corporate Controls

Financial Executive

> • CFOs
> • Vice Presidents of Finance
> • Controllers
> • Treasurers
> • Accounting Directors
> • Financial Management Executives

EXPECTED NUMBER OF ATTENDEES: 200 (approx. 125 financial executives and 75 internal auditors)

SESSION SIZE: General Session: 75-125, Joint General Session: 175-200

EVENT DETAILS

- Three-day program (Monday-Wednesday)
- Separate program for internal auditors and financial executives
- Joint sessions for both conference groups
- Program begins on Sunday, May 3 with a cocktail reception. Program ends on Wednesday, May 6th with a closing keynote.
- Sessions are 45-60 minutes long.
- Set-up is classroom or round tables.
- All sessions must qualify for continuing education credits in accordance with NASBA (National Association of State Boards of Accounting) CE requirements.

WEBSITE:

Financial Executive

www.fmifinex.com

Internal Auditing

www.fmiinternalaudit.com

ADDITIONAL SPEAKER RESOURCES

Please click on the links below for useful tips on preparing your presentation:

- Why Audiences Detest Presenters That Abuse Or Avoid PowerPoint

- Improve Your Conference Lecture By Using These Questions For Peer Discussions

- Conference Audiences Expect These Things

- Q&A Will Not Satisfy Conference Audience Cravings For Participation

TIPS FOR PREPARING AND PRESENTING AN EFFECTIVE PRESENTATION OR WORKSHOP

Session Description

- State your objective(s). Make sure your content aligns with the advertised session description. Create a short, succinct paragraph of about 3 – 4 sentences. Amend your session title if necessary.

Learning Objectives

- Develop learning objectives and learner outcomes. What should the learner be able to do, know, feel at the end of the session? Complete the statement: At the end of the session, the learner should be able to………………….

Use words such as:
Cognitive (knowledge): define, classify, apply, analyze, describe, assess, arrange, identify, list, discuss, explain, distinguish, modify, predict, state, apply, explain, summarize, cite, illustrate
Affective (attitude): identify with, approve, support, verify, accept, formulate
Psychomotor (skills): perform, operate, develop, produce, create, differentiate, construct, assemble

Learning objectives should be **SMART** (**S**pecific, **M**easurable, **A**ttainable, **R**elevant and **T**imely)
Words to AVOID: Understand, Know, Appreciate, Comprehend, Learn, Enjoy, Believe

Session Design

- Where appropriate, consider instructional methods such as discussions, workshops, buzz groups, case studies, simulations and demonstrations instead of the standard lecture.
- Connect to the participants own lives and be problem-centered. Offer a solution to a problem.
- Be product rather than process-driven when describing your session. Focus on what the learner will achieve, perform or demonstrate at the end of the session rather than on what the facilitator will do.
- Follow these steps to design your session: **set up** (set tone, engage participants), **context** (state objectives and learner outcomes), **theory** (deliver the information), **application** (relate theory to participants' experience), **summarize** (wrap up, call to action).

Session Content

- Please be mindful of FMI's "No Commercialization" policy. Blatant sales pitches will not be tolerated by attendees and may affect your evaluation. FMI will review your presentation in advance and may request edits prior to the session start date.
- Know your audience and what they *want* and *need* to learn.
- Don't preach to the choir. Say something new.
- Relate content to the participants' experiences by using activities that help them apply concepts.
- Check your stated learner outcomes and make sure your content allows for them to be achieved.
- Less is more. Be judicious with your slide content.
- Use a picture instead of words, if the picture can tell a story
- Check fonts, colors and backgrounds – make sure they can be seen from a distance
- No more than 30 slides – you only have 45 - 60 minutes and should allow time for Q&A

Session Delivery

- Consider using a blend of information, examples, discussions, visual aids and practice rather an hour-long lecture, if the content lends itself to this delivery method.
- Create a relaxed environment, where attendees are encouraged to discuss questions and concerns openly.
- Audience microphones are provided when appropriate for the room size. Please ask the attendees to wait until the microphone is available so that everyone in the room can hear the question.
- Ask questions as well as answering them. Plan the questions to be asked ahead of time and make sure they are related to the learning objectives
- Refrain from using your presentation as a teleprompter. Don't read from your notes.
- Maintain good eye contact with the attendees rather than looking over their heads or at the screen
- Visual aids should be clear, easy to see, relevant, interesting and simple
- Engage the audience and encourage interaction. Consider audience polling techniques.
- Create a learning environment that extends beyond the session ends by being available for questions and by encouraging attendees to collaborate and share information during networking breaks and meal functions.
- Make use of all the varying ways that adults learn:
  Visual – use visual aids
  Audio – use audio aids
  Kinesthetic – involve attendees in an activity
  Tactile – provide materials

Presentation Upload

- Please provide a detailed session outline as soon as your proposal is accepted
- Upload a draft presentation approximately 4 weeks prior to the conference
- Upload the final presentation no later than 5 days prior to the conference
- All presentations must be uploaded to the Conference Harvester (see tips below). DO NOT send presentations via email to the Program Manager.
- If you are unable to meet any of the specified deadlines, please inform the program manager know as soon as possible. Presentation changes can be accepted right up until the start of the presentation, but we need to know in advance that you plan to make changes
- Bring a backup file to the rehearsal

Conference Calls

- Conference calls are conducted approximately 3-4 weeks prior to the conference to review session content. Conference calls may also be conducted shortly after the speaker is confirmed to discuss session content and delivery methods and answer any questions the speaker may have.
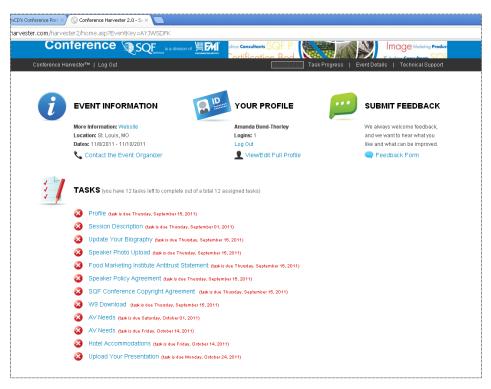
Rehearsals

- Speakers are strongly encouraged to make use of rehearsal times prior to the session. Please discuss with the Program Manager to set up a suitable time onsite.

Evaluations

- An online evaluation of the conference, program and speakers will be conducted immediately after the conference. Speakers and sessions are rated on a scale of 1-5 (poor – very good) and compared in an evaluation summary with other speakers. The results are provided to all speakers within approximately 4 weeks.

TIPS FOR COMPLETING THE CADMIUM CONFERENCE HARVESTER

In order to streamline the speaker process, we will be using an online tool called *Conference Harvester* to track tasks and deadlines, secure speaker permissions, share information and provided a trusted space for presentation uploads. You will be logging into the *Conference Harvester* system through a secure website, using your email address and personalized Access Key, which will be sent to you when your session is confirmed.

The tasks that you are requested to complete vary. You may be asked to complete all or some of the following tasks:

- **Speaker Contact Information**
  You may include the name and email address of an assistant so that he/she is copied on your email and may complete tasks for you.
- **Biography**
  Please keep this short - 250 words or less! Your biography may appear on the conference website or in the conference directory and may be edited for clarity and length.
- **Session Description**
  State your overview of the session and what your objective is. Adjust your title if necessary. Your session description and title may be edited and will used for marketing purposes. Please refer to it often when creating content to make sure that you are delivering what is promised in the marketing collateral.
- **Learning Objectives**
  Please see the attached guidelines for creating SMART (specific, measureable, attainable, relevant, timely) learning outcomes for the attendees. Do NOT use the word 'understand," "know" or other words that are vague and not measurable.
- **Photograph Upload**
  If you do not wish to have a photo included in the onsite directory or do not have a suitable photo, please tick the "nothing to upload" box. Please do not send photos to program managers.

- **Antitrust Statement**
  This is mandatory and must be agreed to by speakers before they can present
- **Speaker Policy Agreement**
  This is mandatory and must be agreed to by speakers before they can present. If you do not agree with any of the statements you may add comments to explain. If you have any questions or concerns about the content of the agreement, please discuss this with the program manager.
- **Permission to Post**
  If you agree, we may post your presentation on the conference website in pdf format or reproduce it in a workbook. The presentation may also be videotaped or photographed. If you do not agree to parts of the statement, there is a section for you to add comments. If you have any issues or concerns, please contact the program manager before signing this agreement.
- **W-9 Download**
  A W-9 is only required if you are being paid an honorarium. You can *download* the form here. Honorarium income will be reported on an IRS 1099 miscellaneous income form.
- **W-9 Upload**
  A W-9 is only required if you are being paid an honorarium. You can *upload* the completed form here.
- **Review of Audio Visual Set**
  Please review the standard audio visual set and contact the program manager if you have any special requirements. Please make sure to inform us if you are using sound or video in your presentation or require access to the internet. Generally, internet access is not provided unless necessary for the successful delivery of the session.
- **Hotel Accommodations**
  Generally, speakers are responsible for making their own hotel arrangements at the official conference hotel. Please complete this task to indicate that you have made your reservations. Unless otherwise agreed to in writing, FMI does not reimburse speakers for hotel accommodations.
- **Travel Reimbursement Form**
  Download the form here if you are being reimbursed for travel expenses. Unless agreed to in writing, FMI generally <u>does not</u> reimburse speakers for travel expenses.
- **PowerPoint Template Download**
  Please download and use the official PowerPoint Template to ensure consistency in the presentations.
- **Presentation Upload**
  Please DO NOT send your presentation to the program manager via email. ALL presentations must be uploaded via the Conference Harvester. If you are not using a slide presentation, please tick the "I have nothing to upload" box, so that we do not continue to chase you! If you are part of a panel and another speaker is uploading a presentation, please click the "I have nothing to upload" box.
- **Registration**
  Unless otherwise agreed upon in writing, speakers should register themselves for the conference and select the special speaker rate. Please accomplish this task to indicate that you have completed the registration process.
- **Disclosure Agreement**
  This is only required if your session qualifies for continuing education credits for pharmacists.

DEADLINES

Please pay close attention to the deadlines specified in your speaker confirmation and complete all tasks by the date due. Conference Harvester is an automated system, so if you do not complete the task, you will continue to be reminded about it until you do! Even if you don't think that a task applies to you, please complete it so that we don't bother you with repetitive requests. For example, complete the accommodation task even if you are not planning to stay at the official hotel and are making your own arrangements.