

A Letter from the President



We started off our first monthly dinner meeting of the 2016-2017 year with a bang and a soft "pillow-top" landing with Steve Stagner, Executive Chairman and Chairman of the Board of Mattress Firm, outlining the success of becoming number one in the U.S. mattress market. His opening statement described the "principal of the path". Have a vision and define your path to achieve the vision. One of the greatest tools to executing the path is by recognizing the importance of management and building a strong team. A firm's biggest asset is their employees who require continuous development. Steve is excited about the path to a global market with Steinhoff International.

At our October 18th dinner meeting we will be hearing from Ann Stern, President and CEO of Houston Endowment, a private foundation of more than \$1.5 billion in assets established to improve life for the people of the greater Houston area. In addition, she currently is a director of the Houston branch of the Federal Reserve Bank of Dallas and is Chairman of the Board of St. John's School. We have a great Professional Development session on "The Digital Finance Function: Robotics Process Automation " from Ryan Senter with our Platinum Sponsor, Sirius Solutions. Our dinner meeting Gold sponsor is Stout Risius Ross. Please continue to support our sponsors who help make our chapter events possible.

Our first Happy Hour of the year was held on Tuesday September 27th at Post Oak Grill where an interesting group of members and prospects were able to connect in a more intimate environment. We plan to have more of these happy hours at various locations in order to enhance the networking opportunities with each other. Our members continue to give us feedback that the most important benefit of membership in the Houston chapter is the ability to meet and interact with other senior financial executives.

We have also heard our members' desire to participate in more soft skills around "leadership". Our first lunch in our Leadership Series will be Wednesday October 12th at Sullivan's on Westheimer. Ms. Judy Lu from TakeRoot will speak on Leading beyond the Logic. This event is also open to non-members for \$35 so be sure to think about bringing some of your peers or subordinates who have an interest in learning more about leadership.

This leads me to more exciting news. With the success of last year's FEI's CFO University, we will be holding the event again

this year. We have partnered with the University Of Houston C. T. Bauer College Of Business for the 2nd annual FEI's CFO University on May 18, 2017 at the University of Houston campus. We are honored to have the Dean of the Bauer College of Business, Dr. Latha Ramchand, as a guest speaker. This event will be open to FEI members and non-members so be sure to mark your calendars. This would be a great event to invite your star employees for succession planning. We try to include topics that CFOs have direct responsibility because subordinates can get siloed in accounting or treasury and not become exposed to the various other disciplines reporting to a typical CFO.

In closing, please don't hesitate to send me questions, ideas, and concerns. I have enjoyed hearing from you and the only way to continue to improve is by seeking feedback. See you at the October events!

Regards,

Ann Kaesermann
President, FEI Houston Chapter

Dinner Meeting

October 18, 2016
Houston Country Club

4:30 Professional Development Session

5:30 Social Hour

6:30 Dinner Session

Register online by
October 14th.

feihouston.org

Sponsored by:



Want to win a gift basket?

Attend the Monthly Meeting's Professional Development Session to be entered for our prize drawing. Must be present to WIN!

Look forward to seeing you at the next Professional Development Session!

FEI Houston Chapter Newsletter

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October 18, 2016 Dinner Meeting

"Impact Philanthropy: Coming Together for Houston's Future"

DINNER SESSION

Ann Stern, Member of Federal Reserve and President of Houston Endowment

General Outline

1. Challenges facing greater Houston—context in which we work
2. Emerging trends in philanthropy—evolving role of philanthropy
3. Power of collaboration with the private and public sector
4. What's working today—examples of success in greater Houston

2016-2017 Season

UPCOMING EVENTS

October 12 - Leadership Lunch Series

October 18 - Monthly Meeting with Ann Stern

November 8 - Monthly Meeting with Christine Spray

Biography

Ann Stern became the president of Houston Endowment on March 1, 2012. Prior to that, she was the executive vice president of Texas Children's Hospital, where she managed inpatient clinical operations and administration.

Ms. Stern previously practiced law with Beck, Redden & Secrest

and Andrews Kurth, and she taught business law at the University of St. Thomas. She earned her bachelor's and law degrees from The University of Texas at Austin. In 2011, she received the Distinguished Alumnus Award for Community Service from The University of Texas School of Law. Ms. Stern chairs the board of St. John's School and serves as a director of the Federal Reserve Bank of Dallas.



- Review the specific capabilities Robotic Process Automation (RPA) can provide for straight-through business process management
- Walk through the key considerations on how best to apply the capabilities for RPA within an organization and its applicability and overall benefits
- How to navigate the pitfalls that can be associated with RPA and mitigate risk associated with the transformation.

Biography

Ryan Senter is an Executive Vice President with Sirius Solutions, L.L.P. and leads the firm's consulting practices. He has over 20 years of experience in management consulting and Finance operations, specializing in process improvement, Finance organization transformation, Human Resources, Information Technology, cost reduction strategies, and merger and acquisition integration. Ryan's industry experience spans travel/transportation, healthcare, financial services, consumer goods and services, manufacturing, energy, and private equity services.

Ryan has extensive experience assisting organizations achieve success around merger integration execution and gaining the synergies expected from initial acquisition targeting, carve out through post-merger implementation. He is a frequent speaker on working capital management, shared services performance improvement and accelerating the pace of change in organizations.

Ryan graduated from the University of Mississippi and is a member of the student Hall of Fame.



"The Digital Finance Function: Robotics Process Automation"

PROFESSIONAL DEVELOPMENT SESSION

Ryan Senter, Sirius Solutions LLLP

Learning Objectives

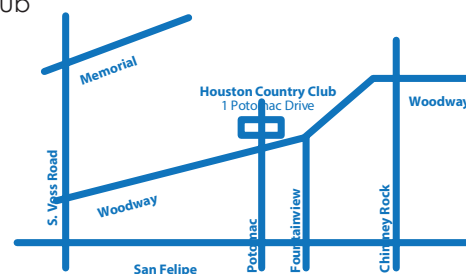
- Define the "digital finance function" and what that means to traditional corporate finance operations
- Examine the enablers and trends surrounding the digital finance function

Meeting Directions

Houston Country Club
1 Potomac Drive
Houston, TX 77057

Register online:
feihouston.org

Registration closes
October 14, 2016.



UH Bauer Executive Education

FEI Leadership Series

Be Prepared to Lead Your Organization in a Dynamic Environment

In every industry change is occurring at an increasing rate. It is not only driven by normal business cycles, it is being driven by changing markets, changing technologies and new market structures. To cope with these changes organizations must work with shareholders, employees, customers and collaborators.

Bauer Executive Education programs for November focus on the skills needed to navigate the new business normal – change at an ever increasing rate.

Negotiation November 4, 2016: Jeanna Abbott, a leader in legal academics and an expert in negotiations for the service industry and an expert in conflict management, will teach this workshop. You will learn from an extensive set of negotiation experiences in class, practice your skills, and benefit from feedback.

Leveraging Persuasive Leadership Communications Skills: November 5, 2016: Designed for leaders at all levels, this workshop focuses on enhancing strategic communications and presentation skills that leaders must have to gain credibility and respect with their key stakeholders, customers, clients and employees. This workshop is led by Kimberly Paisley, a strategic communicator with extensive experience working in corporate, academic, non-profit, agency and consulting organizations.

Leading Change: Two-Day Workshop November 7-8, 2016: The workshop will cover issues such as assessing the need for change, identifying the impediments to successful change and techniques for gaining acceptance and support for change initiatives. Barbara Carlin, a leader and author in the fields of strategic management and organizational behavior, will lead this class.

Strategic Management in Oil & Gas: One-Day Workshop November 11, 2016: Management styles and strategies in the global oil and gas industry are in constant flux. You will analyze global oil and gas strategies, and discuss how organizations can position themselves as leaders in this dynamic, global competitive landscape. Dr. Dusya Vera, an award winning teacher, has taught strategic management internationally including Colombia, Canada, Spain, and China.

Managing Human Resources in the Oil and Gas Industry: One-Day Workshop November 18, 2016: This workshop looks at how the various aspects of the oil and gas industry affect the functional HR areas including staffing, training and development, performance management, and compensation and benefits. Dr. Steve Werner will instruct this class. He has been a consultant to large and small firms including KMPG, Conoco, and the State of Texas

Fundamentals of Change Management November 30 - December 1, 2016: This workshop focuses on the critical success factors and "must-do steps" to enable your organization to successfully manage change and develop the company environment that fosters strong engagement, visible sponsorship and change process sustainability. Mark Hordes who will lead this class, has over 25 years of experience building and training organizations to create, develop and sustain customer and client trust-based relationships.

FEI Leadership Series

FEI Houston is excited to now offer, The FEI Leadership Series, a three event series where we will offer leadership focused meetings for FEI members and prospective members. Traci Brown - Body Language and Persuasion Expert and Holly Tompson, PhD, Associate Director of Coaching, The Doerr Institute for New Leaders | Rice University, will speak later in the year as part of this new leadership initiative. Please see the below information on our first event with Judy Le from TakeRoot.

FEI Leadership Series: Leading Beyond the Logic

When situations call for leadership, we often lean on facts, logic, and our skills and experiences to lead others towards positive outcomes. Why does the initiative supported by the most reliable data and technical processes fall short? Why is the most competent person in the room unable to overcome resistance? Beyond the data and the resume, success of any leadership effort hinges on the willingness of followers to contribute. This is the art of leadership, and the real work of leading. In this interactive presentation, learn about the one critical element that can widen your perspective on leadership and instantly enhance your ability to lead others.

Speaker

Judy Le, TakeRoot

Judy has over 18 years of leadership development experience in the for-profit and non-profit sectors, with a specific focus on working with emerging professionals and managers. Before starting TakeRoot, she served as the director of Leadership at Rice University. In this role, she created and facilitated classes and programs in leadership and professionalism, and worked with organizations across the country to instill a culture of mentoring and talent development.

October 12, 2016

11:30 AM to 1:00 PM

Sullivan's Steakhouse

4608 Westheimer Rd
Houston, TX 77027

Tickets

\$15 FEI Chapter
Members

\$35 Non-Member
Registrations

[Read more and register online.](#)





2016-2017 FEI Houston Mission Statement & Goals

MISSION:

Be the premier resource for Houston financial executives by offering high quality educational and leadership development programs and resources to inquisitive leaders that help advance their careers and allow them a voice in financial matters important to Houston businesses.

GOALS:

- Maintain and enhance the value of the FEI brand by focusing on quality – quality members, programs and sponsors
- Be relevant to members
- Offer high quality programs and resources that help develop current and future financial officers
- Develop high quality and engaged sponsors to assist the Chapter financially, help identify programs and speakers, and help recruit new members
- Make FEI relevant and known in the community through involvement in Houston financial matters; be the voice of the financial community
- Run an effective, professional, and fiscally sound Chapter operation
- Give back to the community through our own foundation and in other ways in which our members personally choose



NEW MEMBERS

Melissa McCartney

Andrew Nat, MBA

Bernard Rohde
*Bentwater Yacht
and Country Club
(Bentwater, LTD)*

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