

University of Washington  
Foster School of Business  
ACCT 579B/C Strategy Through the CFO Lens  
Spring 2015 (T/Th from 3:30-5:20pm)  
Paccar Hall - #390  
May 5, 2015 through June 4, 2015  
Faculty: Jason Broenneke, KPMG Partner, Johnny Lewis, KPMG Senior Manager

### **Administrative Information**

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206-913-4854 (Johnny Lewis)  
Website:  
Office Hours: By appointment  
Prerequisites: None

Strategy Through the CFO Lens provides a unique opportunity for students to hear from and interact with chief financial officers of several of the most significant business entities headquartered in Puget Sound as well as partners and senior managers from KPMG LLP, a global professional services firm. Facilitated by KPMG audit partner Jason Broenneke, and Johnny Lewis KPMG audit senior manager, the course will address strategic and operational issues that each of these entities and their industries face.

The five-week elective course consists of a highly interactive session with local chief financial officers discussing strategic objectives and performance within one industry group, focusing on the key moving parts, relevant issues and how to effectively measure performance. We will use a discussion and debate format to focus on how the company drives performance with respect to these key issues. There will be a mix of one class segments and two class segments. Students will be required to research the industry and company prior to each class and come prepared to interact and drive discussion.

### **Who Should Take This Course?**

This course is an elective, capstone-type learning experience for MBA students and graduate accounting and tax students who have the business knowledge that comes from the core curriculum. Students who enjoy drawing upon core knowledge from multiple disciplines and applying that knowledge to actual business situations will enjoy and thrive in this learning experience.

### **Course Description**

In this class, we will address strategic and operational issues that companies face in multiple industries, and gain insights into how chief financial officers who are responsible for the accounting and financial planning and decision making manage those issues. We will view the business as a whole—from the eyes of the chief financial officer within the business.

### **Course Objectives**

Students who participate in this class will be working to accomplish the following objectives:

- Apply practical thinking skills from various business disciplines to industry issues
- Develop an appreciation for a financial management perspective
- Enhance resources and skills for business problem-solving
- Broaden awareness and knowledge of industry risks and strategies that can be applied to on-the-job situations
- Experience direct interaction with chief financial officers of a variety of major, locally based companies
- Grow your excitement for the careers you will enter within the next few months

### **Assignments and Grading**

All assignments must be turned in on time in order to receive any credit. No late materials will be accepted without prior approval.

All students will complete short (1-2 page) analyses of the issues presented by the CFO, their own assessment and what they would do if faced with the same issue. We expect participation from *everyone* during the class discussions. All assignments will be posted on Canvas in advance of the related class discussion.

The chief financial officer guest speakers will address the class throughout the semester. The guest speaker's remarks should comprise about one-half of the class time and the remaining time will consist of questions and answers. Each student will prepare a question outline relating to each company and their industry by the date of the guest speaker presentation for that company. Students will be expected to lead the questioning of the speaker during the presentation, encouraging and facilitating the participation of all students.

We will record attendance on occasion.

Grading:

Question outlines for CFO speakers	10%
Industry analyses	60%
Attendance, participation and assignments	30%

Articles to be announced will be posted on Canvas.

Class assignments will be posted on Canvas.

### **Code of Conduct**

By being a student in this class you acknowledge that you are a member of a learning community in the Foster School of Business that is committed to the highest academic standards. As a member of this community, you agree to uphold the fundamental standards of honesty, respect, and integrity, and accept the responsibility to encourage others to adhere to these standards.

Although this is a technology-oriented MBA program, we ask that you stay offline during class sessions and only use your laptop for class-related activities. Research shows that being online (surfing the Web, checking email, texting, etc.) inhibits your ability to learn and distracts those around you (including us). Thanks for supporting this policy.

**Topics and Course Outline**

- May 5            The Role of the Chief Financial Officer  
                      Jason Broenneke, KPMG Partner
- May 7            Manufacturing/Aerospace Industry  
                      Bob George, CFO – Esterline Technologies Corporation
- May 12           Manufacturing/Aerospace Industry In-Class Discussion  
                      Bob George, CFO – Esterline Technologies Corporation
- May 14           Technology Industry  
                      Bob Chamberlain, CFO Big Fish Games
- May 19           Technology / Emerging Companies  
                      Brent Johnson, KPMG Partner
- May 21           Healthcare Industry  
                      Chrissy Yamada, CFO Evergreen Health
- May 26           Airline Industry  
                      Brandon Pedersen, CFO – Alaska Airlines
- May 28           Real Estate  
                      Joe Kenny, CFO Matthew G. Norton Company
- June 2           Retail Industry  
                      Dan Templin, CFO – Eddie Bauer
- June 4           Course Wrap-up and final assignment due  
                      Facilitators: Jason Broenneke and Johnny Lewis