

## A Letter from the President



Greetings:

I hope you all are enjoying the cool weather and all of the fall activities that come with it. Before I get into our upcoming events, I'd like to take a moment to ask for your consideration in taking a couple of actions to support your Chapter.

The FEI Houston Scholarship Foundation is a 501(c) 3 charity that strives to provide \$5,000 scholarships annually to juniors in accounting and finance from twelve area colleges. To continue to support this level of funding for the scholarships, the Chapter needs your financial support. Currently the Chapter does not allocate any chapter monies from member dues or sponsorships to support the Foundation. All Foundation support comes from donors like you. As you consider your contributions to charitable causes for this year, please make room in your budget for a donation to this worthwhile cause. You may donate as part of your annual membership renewal or at the Foundation website:

<https://feihoustonfoundation.org/catalog.php?cat=1>

Please consider a generous donation this year. Thank you.

Secondly, I'd like each of you to follow the chapter LinkedIn page <https://www.linkedin.com/showcase/financial-executives-international-fei-houston-chapter/>

We plan to post information about past events and thought leadership articles from our members and sponsors on this page. By "following" our page you will receive updates about the chapter in your LinkedIn news feed and by "sharing" information on our page you will help the chapter extend awareness of our chapter to colleagues in your network. This is an important part of our efforts to extend the FEI brand. Please help us out by following our LinkedIn page.

Our upcoming events include:

- November will kick off on November 6, with a Career Management luncheon sponsored by V&E, at McCormick and Schmick's in the Galleria area. The topic will be "Lifelong Networking" led by Todd Auwarter with the firm Egon Zehnder.

- Our chapter dinner will be on November 13th and will be held at the Junior League **(This is a change of venue. So if you previously scheduled this event, please check your calendar)**. The professional development will be presented by our new sponsor SenseCorp. The topic will be "Analytics: The New Currency of Modern Finance". Our networking hour will be sponsored by Wells Fargo and our dinner panel will be on "Houston's Innovation Ecosystem" lead by Gina Luna. The panel will include three distinguished leaders in the Houston innovation scene. More details and registration are available at our website.

As always, at all of our events we encourage you to bring a colleague who will enjoy expanding their executive network and potentially join our chapter.  
(continued on Page 3)

## Evening Meeting

**November 13, 2018**

### The Junior League of Houston

- 4:00 Beat the Traffic Social**
- 4:30 Professional Development Session**
- 5:30 Social Hour**
- 6:30 Dinner & Presentation**

Register online by Nov. 9<sup>th</sup>. [feihouston.org](http://feihouston.org)

Sponsored by:

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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!

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## November 13, 2018 Dinner Meeting

### Houston's Innovation Ecosystem...Past, Present and Future

#### DINNER SESSION

- What is an innovation ecosystem and why does it matter?
- Innovation in Houston and the background on the formation of Houston Exponential (HX)
- What is Houston Exponential and what does it do?
- How do all the pieces fit together (TMCx, TMC3, Station Houston, Rice/Sears site, The Cannon, etc.)
- Panel discussion with three ecosystem leaders

#### Moderator: Gina Luna, Luna Strategies, LLC

Gina Luna, a recognized leader with invaluable business insight, is a trusted advisor to CEOs and business owners. As CEO of Luna Strategies, Mrs. Luna counsels companies and their leaders on complex strategic issues and

growth initiatives. She has established a reputation of partnering with owners, boards and management from a broad spectrum of industries to deliver solutions and drive results.

Mrs. Luna is a member of the Board of Directors for Tetra Technologies, Inc. (NYSE:TTI), where she serves on the Audit Committee and the Nominating and Governance Committee.

She is also an advisor/board member to a number of privately-held companies.

Prior to founding Luna Strategies, Mrs. Luna held the role as Chairman of JPMorgan Chase in the Houston Region and the head of Middle Market Banking. During her 22-year career with JPMorgan Chase, she led a \$150+ million revenue business, managed sizable teams and filled key leadership roles in marketing and communications, talent development, risk management and strategic planning.



#### Panelist: Tony Nash, Complete Intelligence

Tony Nash is the CEO and Founder of Complete Intelligence, a data technology firm using a proprietary artificial intelligence and machine learning platform to forecast commodities, currencies, equity markets, economics and international trade.

Previously, Tony built and led the global research business for The Economist (EIU) and the Asia consulting business for IHS



(now IHS Markit). He has also been a social entrepreneur, media entrepreneur, writer and consultant.

Tony is a frequent public speaker and leader of closed door dialogues with business and government leaders on markets, economics, risk and technology. He is a contributor to leading global media (BBC, CNBC, Bloomberg, etc) and has served as an advisor to government and think tanks in Tokyo, Singapore, Beijing, Washington DC and others.

Tony is an international advisory board member for Texas A&M University and a non-executive director with Kredit Microfinance Bank in Cambodia. He has a Masters Degree in International Relations from the Fletcher School of Law & Diplomacy at Tufts University and a BA in Business Management from Texas A&M University.

#### Panelist: Dan Parsley, AngelMD

Daniel Parsley is the president of AngelMD, the disruptive technology investment platform and online community focused on early stage healthcare investing. In 2016, Dan opened the Houston office for AngelMD amid the Texas Medical Center's Innovation Institute, one of the largest and fastest growing healthcare ecosystems and accelerators in the US.

Dan has over 30 years of experience operating, funding, advising and investing in technology companies. Most recently, Dan was involved in launching several green tech companies including one of Houston's largest single stream recycling companies. Prior to that, Dan was CEO of SalvageSale, an internet company best described as an "industrial eBay" which auctioned damaged assets sourced by commercial property & marine cargo insurance companies. Dan started his career in management consulting with Accenture and later as a partner with Computer Sciences Corporation.

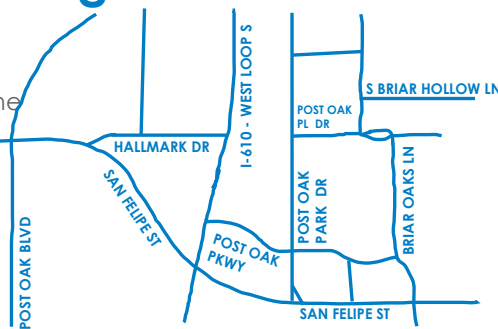
Dan is native of Houston and very active in the charitable community where he resides with his wife and three children. He has served as president of the Children's Museum of Houston and is currently president of the

### Meeting Directions

The Junior League of Houston  
1811 Briar Oaks Lane  
Houston, TX 77027

Register online!

Registration closes  
Nov. 9, 2018.



Executive Association of Houston and board member of San Jose Clinic. Dan received an MBA from the Darden School of Business at the University of Virginia and an undergraduate degree from Texas A&M University. Dan enjoys bird hunting and golf with those willing to put up with his game.

#### Panelist: Gabriela Rowe, Station Houston

Gabriela Rowe is an experienced business leader and innovation strategist, currently serving as the CEO of Station Houston - a growing hub for startup technology companies, corporate innovation and entrepreneurship. Prior to Station Houston, Rowe was the Director of Project Management and Corporate Development at Nord Anglia Education.

Beyond education, Rowe is a champion of the growth and success of Houston. Currently, she is the chair of the Learning Committee for Houston Exponential, a member of both the Greater Houston Partnership's Economic Development and Trade Committee and the Greater Houston Partnership's Executive Women's Committee, while also serving as a board member of TXRX Labs and First Tee of Greater Houston.



## "Analytics: The Currency of the Modern Finance Organization"

### PROFESSIONAL DEVELOPMENT SESSION

In the battle to remain relevant and competitive, insight-driven organizations have a significant opportunity to outflank their competition by unlocking the power of analytics. But realizing the promise of analytics requires a new analytic operating model to deliver insights, at the right time, at the point of decision.

As the modern finance organization becomes increasingly accountable for delivering operational insights and establishing a competitive advantage through advanced analytics, you might feel you are wading into uncharted territory.

This professional development session, presented by Sense Corp, will cover how to:

- **Build the analytics business case:** Quantify the value and justify the spend of an analytics investment
- **Close the gap on the "last mile of analytics":** Operationalizing analytics and optimizing return on investment
- **Monetize your data:** Learn how others are leveraging information-as-an-asset

- **Become a next-generation finance organization:** Build out an analytics operating model that drives value

#### Panelist: Michael Daehne, Sense Corp

Michael Daehne leads the Transformation Practice for Sense Corp. He has extensive experience leading operational and digital transformation programs across a number of industries including energy, manufacturing, telecom, and financial services. Michael is passionate about partnering with finance and operational executives to move the needle and improve bottom line.



#### Panelist: Josh Rachner, Sense Corp

Josh Rachner leads the Data Practice at Sense Corp and fulfills a key leadership role in the firm's Technology division. With extensive expertise across both the Data and Digital landscape, he has delivered solutions across financial services, energy, healthcare, public sector, and transportation industries. Josh is passionate about raising up the next generation of technology leaders to deliver advanced analytics and next gen digital capabilities.



## A Letter from the President (cont.)

You can sign them up for the event through our prospective member form by going to [www.feihouston.org](http://www.feihouston.org) then scrolling over the membership tab to select Prospective Member Form.

Don't forget to connect with our Sponsors during our events. Building high quality relationships with outstanding professional service firms is one of the unique opportunities provided by membership in our chapter.

More details and registration for all these and additional events throughout the year are available at [www.FEIHouston.org](http://www.FEIHouston.org). To schedule your calendar for all events during our upcoming chapter year follow this [link to our Calendar](#).

On behalf of your chapter leadership team, we thank you for your support and participation in our chapter. If you have any suggestions or want to participate in a committee don't hesitate to contact me at [robertmschmitz77@gmail.com](mailto:robertmschmitz77@gmail.com). The time investment is minimal and the payoff is well worth it.

Best wishes and I look forward to seeing you at an upcoming chapter event.

Rob Schmitz  
FEI Houston Chapter President 2018-19



## 10 Ways to Drive Successful Transformation

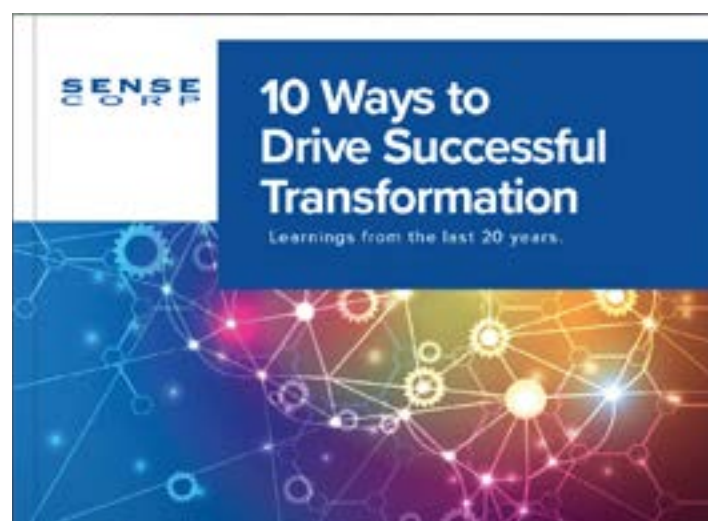
The world around us is changing and companies are fighting hard to stay ahead of the competition. With customers demanding more each day and globalization and technology increasing the rate of disruption, it seems we can never transform fast enough.

Yet as companies work through transformation, the success rate for project implementations is only 29%. This means 71% of projects are classified as challenged or failed. As projects get more complex, incorporate new technology, and involve global teams, driving a project to success becomes even more difficult.

Over the last 20 years, Sense Corp has studied the difference between successful and challenged or failed projects. The bottom line is that it is not easy to set up a project for success, and it is even harder to manage to it. We recognize that every project will have challenges, and the answer is never a silver bullet. Instead, it takes a series of methodical steps to keep the project on the train tracks heading in the right direction.

Here are our top 10 learnings for a successful transformation project.

[Download Now](#)



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## 2018-2019 FEI Houston Mission Statement & Goals

### MISSION:

FEI's mission is to advance the success of senior-level financial executives, their organizations, and the profession.

### 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

**Greg Lucas**  
Intertek

**Sue Raynor**

**Mike Siraj**

**Kate Silva**  
Main Street Capital Corporation

## 2018-2019 STRATEGIC PARTNERS

Secure your FEI Sponsorship today!  
Contact: Tony Maresca, [tmaresca@bepms.com](mailto:tmaresca@bepms.com)

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## FEI Houston Scholarship Foundation

Want to make a donation to the Foundation, review audited financials or see scholarship recipients for this year?

View our website at

<http://feihoustonfoundation.org>



## FEI Houston Officers and Committee Chairs

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