

# Attending the EPM Summit is a **Great Investment**

November 16-19, 2026

Bellagio, Las Vegas

If your role depends on planning, forecasting or consolidation, or you are questioning how AI can help those processes, you need at least **1 person at the EPM Summit!**

Enterprise Performance Management is changing rapidly.  
So is the environment for enterprise finance.  
Understand the impacts of AI and new innovations from every angle.

Is our current EPM platform keeping up?

Resilient enough for the current economic volatility?

Bringing us the newest capabilities?

We recently implemented a new EPM solution but we didn't realize much value, what alternatives exist?

Should we renew our cloud EPM term, the price is going up...is there something better out there?

Our legacy product is sunsetting; what do we do? What's the state of the art?

Can we trust a new vendor that has a best-fit solution?

What about AI?

How is AI usable now for real benefit in finance? What lessons learned do other customers have on AI adoption?

Which vendors and solutions are the best fit for us?

Can we learn how to extract more business value from our current solutions?



## The EPM Summit is unique; it's dedicated to EPM + AI.

You'll find it's the most time- and cost-efficient way to answer all those tough questions. The Summit was designed by analysts and advisors for knowledge transfer, not by marketers.

Those who participate can serve as your Center of Excellence for EPM + AI.

**On-site Analysts (BPM Partners) Help Guide You, 1-to-1  
Deep-Dive Demonstrations by Vendors and Their Consulting Partners**

**11**   
Top Vendors

**10**   
Consulting Firms

**120**   
Sessions



# Your Company Benefits When You **Participate in** the **Summit**

This is a unique EPM-only learning event. Understand the vendor/solution landscape, sit down with advisory consultants for free, figure out how AI + EPM can work together, identify advantages for your company.

## 1. **Prep before coming**

Identify your FP&A, consolidation, data, AI, and overall EPM issues and questions you'll want to resolve. Fill out the Pre-Event Survey. What gaps do you face? Does your finance group need a clear and practical view on AI in EPM? Is your current system burdened with inefficiencies or about to sunset? Advisors and analysts at the Summit can use this to help you. Also: map your 'optimization plan' for the 120 sessions in parallel tracks.

## 2. **Arrive for Product Day and dive deep**

Product Day features comprehensive two-hour demos by all vendors. Their consultants will be there to help explain details as they relate to your company's context. Start to grasp the whole solution landscape. Challenge vendors on their use of AI. Find new functionality and use cases (i.e. revenue planning) that matters to your company.

## 3. **Sit down 1-to-1 with impartial advisors. Map the Gap(s)**

Included is an individual session with BPM Partners, explain your priorities, obtain guidance and suggestion from their unbiased experts. BPM Partners is the only analyst firm dedicated to EPM. They can pinpoint which vendors are likely fits for you. Don't overlook the vendors' on-hand consultants, either. The ability to set up meetings with advisors can help you map out likely solution paths for your company.

## 4. **Absorb the vendor landscape. Iterate and compare.**

The EPM Summit builds your understanding of market leaders and important innovators. It's super-efficient, more so when compared to attending multiple vendor/user conferences. Here, you can get 11 product roadmaps and EPM (and AI) visions. Iterate and compare them to see which fit your future needs.

**Note:** This isn't about collecting marketing brochures. Tell the vendors, consultants and analysts what issues you need to solve. Pick their brains; that's why they'll be there.

## 5. **See where AI fits or doesn't**

AI (from ML to gen AI to agentic AI) brings opportunity and risk. BPM Partners describes 2026 and 2027 as a prime opportunity to try AI with EPM at temporarily low cost. Every finance group needs an in-house authority on how AI is enhancing EPM, where the payoffs are, are which vendors are most relevant to your finance criteria.

## 6. See the vendors compete on solving real finance problems

Their Product Day and in-booth demos are their stress tests, and build your understanding of vendor strengths in addressing specific problems. There's a pop quiz, in that you'll vote on the EPMmy Awards for the vendors and their best solutions.

## 7. Judge real use cases and successes

Consultants walk the walk. Learn how they implement each solution to deliver maximum ROI. They have answers from the front lines. They'll be presenting in many of the Day 2-4 sessions, along with solution users. You might find this specificity at a User Conference, but not for multiple vendors!

## 8. Tap into your peers, and pay it forward

Validate your ideas and solution status against their experiences. Find out what they love or hate about solutions they've worked with. Learn by helping them with their tough issues. And, yes, get the jump on your competitors by building up your strategic, operational and detail knowledge at the same time. The EPM Summit is EPM-focused. Everyone you'll meet is in your field, and they all struggle to solve the same problems you do.

## 9. Return Home and Deliver Value

Provide guidance on AI, inter-department collaboration, new EPM capabilities, legacy upgrades, boosting enterprise resilience in volatile conditions, and specific applications of EPM. You won't have every answer about this rapidly changing space, but you'll know which vendors and services providers to call in formally, and which peers to call for validation.





# What is The EPM Summit?

The single most focused, information-packed EPM event on the planet. Four days with 120+ sessions (hands-on labs, customer stories, multi-vendor panels, technical deep dives). 500 seats. 100% EPM and EPM-specific AI. No filler. We invited a vibrant mix of market leaders and impressive innovators, representing the best of the EPM universe.

## Why it exists

EPM is undergoing major shifts. Agentic AI, new capabilities, new platforms that can transform finance's relationship with operations, and new vendors with valuable enhancements. Everyone's eager to ensure their EPM can handle disruptive change and give resilience to the company. To build a robust view of what will help your company the most, you need balanced information on key players across the vendor landscape. There is no multi-vendor industry conference dedicated to EPM.

## The EPM Summit removes barriers

Let's face it: EPM evaluations are consequential and the odds are against making fast and correct decisions: you have limited products to compare, opaque information clouds the view, and a proper multi-vendor discovery is prolonged and tough to complete. All demos and sales pitches are polished and attractive, but you find out what the software is really like – after it is too late. The EPM Summit removes every barrier in one shot. Visit and revisit with 11 leading software vendors and innovators, while picking the brains of 10 their best-informed consulting partners. Get guidance directly from BPM Partners (the only EPM-dedicated analyst firm), and senior customer leaders—all in the same room, on the same stage, answering the same hard questions.

## WHO WILL BE THERE

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<h3>10+</h3> <p>Top EPM software vendors (click here to see the latest) <a href="https://epmsummit.com/exhibitors/">https://epmsummit.com/exhibitors/</a></p>	<h3>10</h3> <p>Trusted-advisor consulting powerhouses</p>
<p>BPM Partners (Craig Schiff &amp; team), impartial advisory experts</p>	<h2>EPM Peers</h2> <p>A capped number of hundreds of your accomplished EPM peers at enterprises relatable to yours</p>

# When & Investment

(Early Bird – ends soon) **November 16-19, 2026**

Executive Access (all sessions, no hands-on)

**\$2,250 pp (groups of 3+)**

All-Access Pass (includes hands-on labs)

**\$2,700 pp (groups of 3+)**

Single registration: up to \$4,000  
This is intentionally a premium, capped event—400 seats total after speakers/exhibitors.

## Your organization needs you there. Here's why.

Your company needs an in-house resource who knows the EPM vendor/solution landscape and can get answers quickly. The EPM Summit is the best path to equip your team with that expert(s). There are also specific challenges that motivate finance teams to participate.

### Your business case for participating

#### 1. Board-Level AI Mandate

CFOs are being told: “Find the AI value in finance—now.” Your obstacles: Roadmaps are shaky, pilots fail, and most vendors over-promise. You’ll head home after the Summit with vetted, customer-proven AI use cases and a practical activation sequence that actually works.

#### 2. Legacy Maintenance Cliff

If SAP BPC, Oracle Hyperion, or any 2010-era solution is on life support, a defensive “safe” switch is the fastest way to lock in another decade of mediocrity—instead of positioning Finance as a strategic leader for the company. The Summit lets you compare real AI-enabled, future-proof alternatives side-by-side—no sales spin, just live demos and customer war stories.

Your leap, your finance transformation in switching to a modern cloud-based solution may be much easier than you expect. Come find out.

#### 3. New EPM Capabilities—Missing Out is No Option

Potentially revolutionary advances for finance are happening in EPM right now. Staying siloed while peers adopt agentic workflows, full-coverage models, and real-time orchestration puts you at material risk of being out-executed.

**Four days here = 1 to 1.5 years of strategic finance Catch-Up**



# Why This Event is **Unmatched**

Typical Vendor User Conference	Generic Finance Tech Event	EPM Summit 2026
One product, one story	5 % relevant content	100 % EPM-focused (+ AI)
Pep-rally atmosphere	Impossible to find peers	500 EPM leaders
Curated happy-path demos	Zero hands-on access	12 hands-on labs
No competitive comparison	No analyst 1-on-1s;	BPM Partners bespoke brief-ings
Hype/Training/Subscription	Random solution dabbling; hunting needles in a haystack	EPM Immersion across prod-ucts

## What's **Included**

- ✓ 4 full days  
[Feb 17 Product Day, Feb 18 – 20 Meeting, In-booth, exhibition, etc)
- ✓ Breakfast, lunch, breaks daily
- ✓ All 120+ sessions
- ✓ Hands-on lab access  
(All-Access Pass required)
- ✓ Private BPM Partners analyst briefing
- ✓ See how solutions focus on specific challenges: revenue planning, supply chain planning, workforce planning, consolidation, and overall FP&A.
- ✓ Full networking app with 1-on-1 scheduling

## **Not Included**

Travel, hotel, dinners  
(group room block at Bellagio available)

# How to Extract Maximum ROI

## 1. Complete the Pre-Event Survey

Tell us your exact evaluation criteria. We route you to the right vendors, consultants, and peers before you land.

## 2. Outline Your Dream Requirements In Advance

Map what you'll need vendors to prove they can solve and how

## 3. Use the App Ruthlessly

- Build your personal agenda (popular sessions fill fast)
- Book 1-on-1s with vendors, analysts, and peers
- Bring 2-3 teammates to “divide and conquer” overlapping sessions

## 4. Hands-On Labs

Test selected solutions from 12 different options. Months of POC scheduling compressed into one day.

## 5. Schedule Your BPM Partners Briefing

30-minute custom guidance from the only analysts who live and breathe EPM. These book fast and sell out early—claim yours on day one.

## 6. Attend the EPMies Awards

Watch vendors solve the exact same real-world requirements you submitted, then vote live. Instant apples-to-apples comparison.

## 7. Network Like Crazy

Peer roundtables, evening events, and the Summit Store gamification encourage interaction - making meeting the exact people facing similar challenges very easy.





# Highly Cost-Effective

Participating in the EPM Summit lets you compress the following strategic finance tasks into just three or four days.

Activity to select EPM solution(s)	Typical Effort Outside Summit	At Sum-mit	Time Saved	Why EPM Summit is Better
Multi-vendor hands-on demos	3-6 months scheduling with 3 or 4 vendors	1 day	5 months wait to collect demo results	Test more solutions; opportunity to ask vendors to demo your issues. Approaches Proof of Concept validation. See vendors solve your solutions live, on the spot.
Multiple consulting firm in-terviews	3-6 months scheduling	1 after-noon	Immediate feedback vs months	On the spot guidance, insights into each solution. Savings: Consultant advisory fees
Analyst briefing (BPM Partners)	\$3k + one month wait	Included	Immediate feedback	Savings: Analyst firm advisory fees
Peer benchmark conversations	Years of conferences	4 days	Significant	High value, often underestimated. Easier to meet relevant peers at EPM Sum-mit than at broader conference
Discovering products and use cases	Years of conferences	4 days	Far better than canned "success stories"	High value; more efficient to find EPM specific use cases at EPM Summit
Build up knowledge of the solution landscape	Months of study;			Identify gaps and solutions faster to speed necessary finance transformation
Understand AI use cases in EPM	Months of study;			Quickly separate near term, longer-term and low value AI uses
Understand new innovative and operations capabilities	Months of study;			Speed up adoption of operations ca-pabilities: revenue planning, work-force, etc etc.
Summary	EPM Summit fills in your knowledge gaps		Months of logistics saved	Massively time and cost effective

# The EPM Summit 2026 is the fastest, most cost-effective and lowest-risk way to:

- ✓ Enable your organization to leapfrog 12-24 months ahead of EPM/AI Curve
- ✓ Create an in-house Center of Excellence on using EPM to strategically support a modern enterprise navigating today's uncertainties
- ✓ De-risk your next EPM decision and future-proof against AI disruption

Registration is open and  
seats are capped.

Secure approval and register today:  
[epmsummit.com/register](https://epmsummit.com/register)

See you at the Bellagio

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[www.epmsummit.com](http://www.epmsummit.com)