



Consulting and Training | Reach New Heights

Course Name

Strategic Financial Planning and Performance Analysis Excellence

Sector Name

Finance, Accounting and Banking

Document Type

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Strategic Financial Planning and Performance Analysis Excellence

Course Introduction

Today, Finance professionals and business leaders must be able to translate financial data into strategic insights, develop realistic financial plans, evaluate performance against organizational objectives, and make informed decisions that support growth, profitability, and long-term value creation.

This training program is designed to strengthen participants' ability to connect financial planning with business strategy and use financial analysis as a decision-making tool.

This program covers the full cycle from strategic financial planning and budgeting to forecasting, performance measurement, variance analysis, financial modeling, and management decision-making.

Participants will also develop the skills required to move beyond reviewing financial results toward actively interpreting financial performance, identifying business drivers, anticipating future outcomes, and recommending strategic actions.



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Strategic Financial Planning and Performance Analysis Excellence

Target Audience

- ✓ Finance Managers and Financial Planning & Analysis (FP&A) Professionals
- ✓ Financial Controllers and Management Accountants
- ✓ Budgeting and Planning Professionals
- ✓ Financial Analysts and Business Analysts
- ✓ Accounting and Finance Team Leaders
- ✓ Strategy and Business Planning Professionals
- ✓ Department Heads involved in budgeting and performance management
- ✓ Managers responsible for financial and operational performance
- ✓ Senior professionals who contribute to strategic and financial decision-making

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Learning Objectives

- ✓ Understand the principles and strategic role of financial planning in organizational performance.
- ✓ Translate business strategies and objectives into financial plans and measurable financial targets.
- ✓ Develop integrated budgets and financial forecasts aligned with business priorities.
- ✓ Analyze financial statements and identify key performance drivers and trends.
- ✓ Apply financial and management accounting techniques to support strategic decision-making.
- ✓ Conduct meaningful variance and performance analysis and identify root causes of deviations.
- ✓ Develop and use financial models for forecasting, scenario analysis, and decision support.
- ✓ Evaluate profitability, efficiency, liquidity, and financial sustainability using relevant KPIs.
- ✓ Assess alternative business scenarios and their potential financial implications.
- ✓ Communicate financial insights and recommendations effectively to senior management and non-financial stakeholders.

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Strategic Financial Planning and Performance Analysis Excellence

Course Outline

✓ DAY 01

Strategic Financial Planning & Business Alignment

Foundations of Strategic Financial Planning

- ✓ Understanding the role of strategic financial planning in organizational success.
- ✓ Connecting corporate strategy, business objectives, and financial priorities.
- ✓ Distinguishing between operational planning, financial planning, and strategic planning.
- ✓ Identifying key financial drivers of organizational growth and profitability.
- ✓ Understanding the relationship between revenue, costs, profitability, cash flow, and value creation.
- ✓ Assessing the financial implications of strategic initiatives and business decisions.
- ✓ Establishing financial targets that support organizational priorities.
- ✓ Building a strategic financial planning framework and planning cycle.

Translating Business Strategy into Financial Plans

- ✓ Converting strategic objectives into measurable financial outcomes.
- ✓ Linking strategic initiatives to revenue, cost, investment, and cash-flow requirements.
- ✓ Identifying business assumptions and financial planning drivers.

- ✓ Developing financial objectives across short-, medium-, and long-term horizons.
- ✓ Aligning departmental plans with organizational financial targets.
- ✓ Integrating financial and non-financial performance indicators.
- ✓ Identifying financial risks and constraints during strategic planning.

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Strategic Financial Planning and Performance Analysis Excellence

Course Outline

✓ DAY 02

Budgeting, Forecasting & Financial Modeling

Strategic Budgeting & Resource Allocation

- ✓ Understanding the strategic purpose of budgeting beyond cost control.
- ✓ Developing revenue, operating expense, capital expenditure, and cash budgets.
- ✓ Applying top-down and bottom-up budgeting approaches.
- ✓ Establishing realistic budget assumptions and financial baselines.
- ✓ Aligning resource allocation with strategic priorities and expected returns.
- ✓ Identifying cost drivers and opportunities for cost optimization.
- ✓ Managing competing departmental priorities within financial constraints.

Financial Forecasting & Scenario Planning

- ✓ Understanding forecasting methodologies and their applications.
- ✓ Developing rolling forecasts to support proactive financial management.
- ✓ Identifying key variables and assumptions influencing financial forecasts.
- ✓ Using historical performance and business trends to improve forecasting accuracy.
- ✓ Applying sensitivity analysis to assess changes in critical assumptions.
- ✓ Developing best-case, base-case, and worst-case financial scenarios.
- ✓ Evaluating the financial impact of strategic alternatives and market changes.

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Course Outline

✓ DAY 03

Financial Performance Analysis & Business Intelligence

Financial Statement Analysis for Decision-Making

- ✓ Understanding the strategic meaning of the income statement, balance sheet, and cash-flow statement.
- ✓ Analyzing revenue, gross profit, operating profit, and net profitability trends.
- ✓ Assessing liquidity, solvency, leverage, and financial stability.
- ✓ Evaluating working capital performance and cash conversion.
- ✓ Applying profitability and efficiency ratios to assess business performance.
- ✓ Identifying relationships between financial statement components and business activities.
- ✓ Detecting financial trends, warning signals, and areas requiring management attention.

Performance Measurement & Financial KPIs

- ✓ Designing financial KPIs aligned with strategic business objectives.
- ✓ Selecting meaningful indicators for profitability, growth, efficiency, and cash performance.
- ✓ Understanding leading and lagging financial performance indicators.
- ✓ Establishing performance benchmarks and appropriate targets.

- ✓ Connecting financial KPIs with operational and business performance.
- ✓ Using dashboards and management reports to monitor financial performance.
- ✓ Identifying performance gaps and prioritizing areas for management intervention.

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Course Outline

✓ DAY 04

Variance Analysis, Profitability & Performance Improvement

Advanced Variance Analysis & Root-Cause Diagnosis

- ✓ Understanding the purpose and limitations of traditional variance analysis.
- ✓ Analyzing revenue, volume, price, mix, cost, and margin variances.
- ✓ Distinguishing between controllable and uncontrollable performance variances.
- ✓ Identifying the operational and strategic causes behind financial deviations.
- ✓ Using root-cause analysis to move beyond reporting numerical differences.
- ✓ Evaluating favorable and unfavorable variances from a business perspective.
- ✓ Converting variance findings into corrective and preventive actions.

Profitability Analysis & Performance Improvement

- ✓ Understanding profitability drivers across products, services, customers, and business units.
- ✓ Applying contribution margin and cost-volume-profit analysis.
- ✓ Identifying high-value and low-value revenue and cost drivers.
- ✓ Evaluating customer, product, project, and business-unit profitability.
- ✓ Assessing pricing, volume, cost, and resource allocation decisions.
- ✓ Identifying opportunities to improve margins and operational efficiency.
- ✓ Prioritizing financial improvement initiatives based on business impact.

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Course Outline

✓ DAY 05

Strategic Decision-Making, Financial Modeling & Executive Insights

Financial Modeling for Strategic Decision-Making

- ✓ Understanding the structure and principles of integrated financial models.
- ✓ Building relationships between operational assumptions and financial outcomes.
- ✓ Modeling revenue growth, cost structures, profitability, and cash flow.
- ✓ Applying scenario and sensitivity analysis to strategic decisions.
- ✓ Evaluating investment and business expansion alternatives.
- ✓ Assessing the financial impact of major strategic initiatives.
- ✓ Identifying model risks, assumptions, limitations, and potential biases.

Performance Review & Strategic Financial Insights

- ✓ Converting financial analysis into actionable management insights.
- ✓ Distinguishing between financial reporting and performance-driven business analysis.
- ✓ Developing financial performance reports and narratives.
- ✓ Communicating financial results to non-financial decision-makers.
- ✓ Presenting performance gaps, financial risks, and emerging opportunities.
- ✓ Linking financial insights to strategic recommendations and management actions.

- ✓ Developing forward-looking recommendations based on trends, scenarios, and performance evidence.

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Confirmed Sessions

FROM	TO	DURATION	FEES	LOCATION
Dec. 21, 2026	Dec. 25, 2026	5 days	4250.00 \$	UAE , Dubai
Feb. 1, 2027	Feb. 5, 2027	5 days	4950.00 \$	Turkey , Istanbul
May 31, 2027	June 4, 2027	5 days	4250.00 \$	UAE , Dubai
Oct. 3, 2027	Oct. 7, 2027	5 days	4250.00 \$	KSA , Riyadh

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