



Course : Financial Analysis, Planning & Control

City :	London	Hotel :	The Ritz London
Start Date :	2025-10-20	End Date :	2025-10-24
Period :	1 Week	Price :	5950 \$

Course Overview

Management has become an essential component of operations across a wide range of organizations. Understanding financial analysis, planning, and control is critical for gaining insights into various organizational aspects, from quantitative calculations to broader operational practices. This program emphasizes the practical application of financial models and analytical techniques to evaluate both the strategic and operational positions of an organization.

Effective financial analysis is vital for organizations aiming to optimize costs and generate additional value. Participants will gain knowledge of the financial business environment, strategic planning processes, management reporting, and decision-support mechanisms.

The Financial Analysis, Planning & Control training course is designed to provide participants with a comprehensive understanding of the decision-making process, diverse valuation methods, and the interpretation of financial information for strategic advantage.

Key learning outcomes of this course include:

- Understanding the conceptual framework for financial and economic analysis and its role in decision-making.
- Examining the structure of financial statements and applying key financial tools and techniques to assess business performance.
- Projecting financial requirements and analyzing information to support planning and control functions.
- Evaluating investment decisions using time-adjusted measures, considering strategic perspectives, and addressing risk and uncertainty.
- Valuing businesses and exploring methods to enhance value through mergers, acquisitions, restructuring, and reorganizations.
- Developing and monitoring key performance indicators, reporting on trends, and identifying the causes of unexpected variances.

Course Objectives

By the end of this training you will learn to:

- Evaluate capital investments, financing options and cash flows
- Evaluate business operations, processes, managers and capacity utilisation
- Use the information provided in financial statements for analysing the financial performance

- Forecast future business conditions

Target Audience

Professionals working in accounting and finance

Financial controllers, finance managers, financial systems analysts, senior accountants, financial accountants, management accountants

Chief Financial Officers (CFOs), finance directors and strategic planners

Methodology

The program will be delivered through a mix of **interactive lectures, case studies, hands-on exercises, and group discussions**. Participants will use **financial models, Excel tools, and real-world examples** to apply concepts of analysis, planning, and control. The approach ensures both **conceptual understanding** and **practical application** to support better financial decision-making.

Course Outline

Day 1: Foundations of Financial and Economic Decision-Making

- The Challenge of Financial and Economic Decision-Making
- Principles and Practice of Financial/Economic Analysis
- Understanding the Value-Creating Company
- Corporate Value vs. Shareholder Value
- Adopting a Dynamic Perspective of Business
- The Agency Problem and Corporate Governance
- Identifying Relevant Information and Data
- Structure and Nature of Financial Statements
- The Context of Financial Analysis and Decision-Making

Day 2: Assessment of Business Performance

- Evaluating Business Performance
- Ratio Analysis for Performance Assessment

- Perspectives: Management, Owners, and Lenders
- Ratios as a System – Pyramids of Ratios
- Integration of Financial Performance Analysis
- Economic Value Added (EVA)
- Predicting Financial Distress – Z-score Model

Day 3: Investment Decision Analysis

- Principles of Investment Decision-Making
- Applying Time-Adjusted Measures: NPV, IRR, MIRR
- Strategic Perspectives in Investment Analysis
- Integrating EVA and NPV
- Refinements in Investment Appraisal
- Equivalent Annual Cost (EAC)
- Sensitivity, Scenario, and Simulation Analysis
- NPV Break-even and Risk Management

Day 4: Projection and Control of Financial Requirements

- Interrelationships in Financial Projections
- Preparing Operating Budgets
- Standard Costing and Variance Analysis
- Cash Forecasting and Cash Budgets
- Sensitivity Analysis in Financial Planning
- Dynamics and Growth of Business Systems
- Operating Leverage
- Financial Growth Plans and Modelling

Day 5: Valuation and Value-Based Management

- Managing for Shareholder Value
- Perspectives on Shareholder Value Creation
- Evolution of Value-Based Methodologies
- Creating Value through Restructuring and Combinations
- Financial Strategy in Acquisitions
- Business Valuation Techniques
- Restructuring and Reorganizations

Certificates



On successful completion of this training course, HighPoint Certificate will be awarded to the delegates.
Continuing Professional Education credits (CPE): In accordance with the standards of the National Registry of CPE Sponsors, one CPE credit is granted per 50 minutes of attendance.

