Strategic Financial Planning and Analysis Training Course



07 - 11 Dec 2026

Lisbon

4500 € (Per Person)

Ref: #BC4362_30615

Course Introduction / Overview:

In today's dynamic business environment, strategic financial planning and analysis are critical for organizational success. This comprehensive training course, offered by BIG BEN Training Center, provides participants with the essential skills and knowledge to effectively manage financial resources, make informed decisions, and drive sustainable growth. Participants will delve into the intricacies of financial forecasting, budgeting, variance analysis, and performance management, equipping them with the tools to navigate complex financial landscapes. The course emphasizes practical application through real-world case studies and interactive exercises, ensuring that participants can immediately apply their learning to their respective roles. We will explore the principles outlined in seminal works such as "Financial Statement Analysis and Security Valuation" by Stephen Penman, providing a robust theoretical foundation. This training will enable professionals to enhance their financial acumen and contribute strategically to their organizations' financial health. BIG BEN Training Center is committed to providing high-quality training that empowers individuals and organizations to achieve their financial goals. This course will cover everything from basic financial planning to advanced variance analysis techniques.

Target Audience / This training course is suitable for:

- Financial analysts.
- Budget analysts.
- Management accountants.
- Finance managers.
- Business controllers.
- Strategic planners.
- Project managers.

Target Sectors and Industries:

- Banking and finance.
- Manufacturing.
- Retail and e-commerce.
- Healthcare.
- Technology and telecommunications.
- Government agencies.
- Consulting firms.

Target Organizations Departments:

- Finance departments.
- Accounting departments.
- Budgeting departments.
- Strategic planning departments.
- Financial analysis departments.
- Management accounting departments.

Course Offerings:

By the end of this course, the participants will have able to:

- Develop comprehensive financial plans aligned with organizational goals.
- Conduct thorough variance analysis to identify and address performance gaps.
- Apply forecasting techniques to predict future financial outcomes.
- Prepare and manage budgets effectively.
- Evaluate investment opportunities using financial analysis tools.
- Improve decision-making through data-driven insights.
- Enhance financial communication and reporting skills.

Course Methodology:

BIG BEN Training Center employs a blended learning approach that combines theoretical instruction with practical application. The training methodology includes interactive lectures, case studies, group discussions, and hands-on exercises. Participants will work on real-world scenarios to apply the concepts learned and develop their problem-solving skills. The course incorporates the use of financial modeling software and tools to enhance analytical capabilities. Emphasis is placed on teamwork and collaboration, allowing participants to learn from each other's experiences and perspectives. Regular feedback and assessments are provided to track progress and ensure understanding. BIG BEN Training Center is committed to creating a dynamic and engaging learning environment that fosters knowledge retention and skill development. The course also includes opportunities for participants to share their own experiences and challenges, creating a collaborative learning environment.

Course Agenda (Course Units):

Unit One: Introduction to Strategic Financial Planning

- Overview of financial planning.
- Importance of strategic alignment.
- Financial planning process.
- Setting financial goals and objectives.
- Understanding financial statements.
- Key financial ratios and metrics.

Unit Two: Financial Forecasting Techniques

- Introduction to financial forecasting.
- Qualitative and quantitative forecasting methods.
- Time series analysis.
- Regression analysis.
- Scenario planning.
- Forecasting sales, expenses, and cash flow.

Unit Three: Budgeting and Budgetary Control

- Principles of budgeting.
- Types of budgets.
- Budget preparation process.
- Budgetary control techniques.
- Variance analysis.
- Performance reporting.

Unit Four: Variance Analysis and Performance Management

- Introduction to variance analysis.
- Types of variances (e.g., material, labor, overhead).
- Calculating and interpreting variances.
- Root cause analysis.
- Performance management frameworks.
- Using variance analysis for performance improvement.

Unit Five: Financial Analysis and Decision-Making

- Capital budgeting techniques.
- Net present value (NPV).
- Internal rate of return (IRR).
- Payback period.
- Cost-benefit analysis.
- Risk analysis.

FAQ:

Qualifications required for registering to this course?

There are no requirements.

How long is each daily session, and what is the total number of training hours for the course?

This training course spans five days, with daily sessions ranging between 4 to 5 hours, including breaks and interactive activities, bringing the total duration to 20 - 25 training hours.

Something to think about:

How can organizations effectively integrate financial planning and analysis with their overall strategic objectives to achieve sustainable growth?

What unique qualities does this course offer compared to other courses?

This Strategic Financial Planning and Analysis Training Course offered by BIG BEN Training Center distinguishes itself through its comprehensive curriculum, practical focus, and expert instruction. Unlike other courses that may only cover basic financial concepts, this training delves into advanced techniques such as scenario planning, regression analysis, and root cause analysis, providing participants with a deeper understanding of financial dynamics. The course emphasizes real-world application through case studies and hands-on exercises, ensuring that participants can immediately apply their learning to their respective roles. Furthermore, the course incorporates the use of financial modeling software and tools, enhancing participants' analytical capabilities. BIG BEN Training Center's commitment to creating a dynamic and engaging learning environment, coupled with its experienced instructors, ensures that participants receive a high-quality training experience that empowers them to excel in their careers. The course also focuses on developing participants' communication and reporting skills, enabling them to effectively convey financial insights to stakeholders.