Strategic Financial Data Analysis and Reporting Training Course

19 - 23 Oct 2026

Lisbon

4500 € (Per Person)

Ref: #DM7100_90931

Course Introduction / Overview:

This course provides a comprehensive framework for mastering the critical skills of financial data analysis and strategic reporting. In today's data-driven economy, the ability to not only analyze financial numbers but also to communicate their implications effectively is paramount for organizational success. This program moves beyond basic accounting principles to delve into the sophisticated techniques required for robust financial modeling, performance evaluation, and insightful reporting. We will explore the practical application of international standards such as IFRS and GAAP, ensuring your reports are compliant and credible. Drawing on concepts from leading academics like Stephen Penman in his seminal work "Financial Statement Analysis and Security Valuation," participants will learn to uncover the stories hidden within the data. BIG BEN Training Center has designed this curriculum to empower professionals to transform raw financial data into a powerful tool for strategic decision-making, enabling them to influence key stakeholders and drive business growth. This immersive experience is structured to build confidence and competence in handling complex financial information and presenting it with clarity and impact.

Target Audience / This training course is suitable for:

- Financial Analysts.
- Accountants and Senior Accountants.
- Finance Managers and Controllers.
- Corporate Planners and Strategists.
- Financial Planning and Analysis (FP&A) professionals.
- Business Analysts with a focus on finance.
- Internal and External Auditors.
- Investment Analysts.
- Professionals in investor relations departments.
- Anyone seeking to enhance their financial analysis and reporting skills.

Target Sectors and Industries:

- Banking and Financial Services.
- Investment and Asset Management.
- Insurance and Risk Management.
- Manufacturing and Engineering.
- Technology and Telecommunications.
- Healthcare and Pharmaceuticals.
- Retail and Consumer Goods.
- Energy and Utilities.
- Governmental bodies and public sector organizations.
- Consulting and Professional Services.

Target Organizations Departments:

- Finance Department.
- Accounting Department.
- Financial Planning and Analysis (FP&A).
- Strategic Planning Department.
- Internal Audit and Compliance.
- Investor Relations.
- Treasury Department.
- Corporate Development.
- Risk Management.

Course Offerings:

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

- Apply key financial reporting standards like IFRS and GAAP accurately.
- Perform advanced financial statement analysis to assess corporate performance.
- Develop robust financial models for forecasting and valuation purposes.
- Utilize data visualization techniques to create insightful financial dashboards.
- Master financial storytelling to communicate complex data to non-financial stakeholders.
- Conduct comprehensive variance analysis to identify key business drivers.
- Evaluate and implement key performance indicators (KPIs) for performance management.
- Prepare regulatory-compliant reports for internal and external use.
- Leverage technology to automate and enhance financial reporting processes.
- Integrate financial analysis into the strategic decision-making process.

Course Methodology:

The training methodology at BIG BEN Training Center is designed to be highly interactive, practical, and engaging, ensuring that participants can immediately apply their learning in a professional context. We employ a blended learning approach that combines expert-led presentations with hands-on workshops, real-world case study analysis, and collaborative group exercises. Participants will work with realistic financial data sets to build models, create reports, and present their findings, simulating the challenges they face in their roles. The course emphasizes a "learning by doing" philosophy, where interactive sessions encourage active participation, discussion, and problem-solving. Our experienced instructors facilitate a dynamic learning environment, providing personalized feedback and guiding participants through complex topics. The curriculum is structured to build skills progressively, from foundational principles to advanced strategic applications. This immersive and practical approach ensures a deep understanding of financial data analysis and reporting, equipping participants with the confidence and competence to excel.

Course Agenda (Course Units):

Unit One: Foundations of Financial Analysis and Reporting Standards

- The strategic role of financial analysis in modern business.
- Overview of the financial reporting ecosystem.
- Deep dive into International Financial Reporting Standards (IFRS).
- Understanding U.S. Generally Accepted Accounting Principles (GAAP).
- Sources and quality of financial data for analysis.
- Ethical considerations and data integrity in financial reporting.
- The link between financial reporting and corporate strategy.

Unit Two: Advanced Financial Statement Analysis Techniques

- Techniques for analyzing the income statement and balance sheet.
- Mastering cash flow statement analysis and interpretation.
- Advanced ratio analysis and industry benchmarking.
- Common-size and trend analysis for performance evaluation.
- Identifying and interpreting financial red flags.
- Analyzing footnotes and management discussion sections.
- Evaluating earnings quality and sustainability.

Unit three: Financial Modeling and Forecasting

- Principles of effective financial model design and structure.
- Building a three-statement financial model from scratch.
- Techniques for revenue, cost, and cash flow forecasting.
- Scenario planning and sensitivity analysis for decision-making.
- Introduction to valuation modeling (DCF and Comparables).
- Best practices for model auditing and error checking.
- Using advanced Excel functions for financial modeling.

Unit Four: Data Visualization and Financial Storytelling

- Principles of effective data visualization for finance.
- Designing and building interactive financial dashboards.
- Choosing the right charts and graphs for financial data.
- The art of financial storytelling.
- Crafting compelling narratives for different audiences (e.g., executives, investors).
- Presenting complex financial information with clarity and impact.
- Practical workshop on creating a management report.

Unit Five: Strategic Reporting and Modern Challenges

- Developing Key Performance Indicators (KPIs) that drive performance.
- Integrating financial and non-financial metrics in reporting.
- Introduction to integrated reporting and sustainability (ESG) disclosures.
- Automating financial reporting processes.
- Navigating regulatory reporting requirements (e.g., SEC filings).
- The impact of Big Data and AI on financial analysis.
- Final capstone project.

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:

In an era of increasing automation and AI in finance, how does the human element of 'financial storytelling' retain its value in strategic decision-making?

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

This course distinguishes itself by focusing on the critical intersection of technical analysis and strategic communication. While many programs concentrate solely on the mechanics of financial modeling or the rules of accounting standards, this curriculum is built on the philosophy that data is only as valuable as the decisions it inspires. We move beyond software-specific training to teach the timeless principles of financial storytelling and data visualization, empowering participants to craft compelling narratives that resonate with executive leadership and key stakeholders. The program emphasizes a holistic understanding, connecting the dots between granular data analysis, high-level corporate strategy, and regulatory compliance. Rather than just learning how to build a model, participants will learn how to use that model to test assumptions, challenge conventions, and drive strategic dialogue. The hands-on, case-study-based approach ensures that learning is not just theoretical but deeply practical, preparing professionals to translate complex financial information into clear, actionable business intelligence.