



Course : Financial Analysis, Planning & Control

City :	London	Hotel :	The Ritz London
Start Date :	2025-11-24	End Date :	2025-11-28
Period :	1 Week	Price :	5950 \$

Course Overview

The ability to analyse a company's financial performance, plan effectively, and exercise sound control is both critical and often debated among stakeholders. This training course offers participants a comprehensive insight into the core principles of financial analysis, planning, and control. Through this programme, participants will strengthen their financial analysis skills, learn to ask the right financial questions, and accurately assess the key risks facing organisations and their shareholders. By attending the Training Course, delegates will gain the confidence to plan more effectively, interpret and comment on financial results, and evaluate the overall financial health of their organisation. Developing the capability to analyse financial and risk-related aspects of any business requires not only technical knowledge but also practical expertise. This course is carefully designed to equip participants with the necessary knowledge, skills, and tools through a blend of theory, interactive exercises, case studies, and practical techniques.

Course Objectives

By the end of the training course the delegates will be able to:

- Understand the Use and Importance of Financial Statements
- Tools and Techniques of Financial Analysis useful in Decision Making
- The Use of the budgetary and Control Techniques
- Standards, Flexed Budgets and Variance Analysis
- How to use Variance Analysis Results to Improve Operational Performance?
- The Application of Discounted Cash Flow (DCF) Methods
- Effective Analysis of Capital Investment Projects using Various Techniques
- How Corporate Value and Shareholder Value are Enhanced?
- Why Corporate Restructuring through Mergers and Acquisitions is Important?

Target Audience

This Financial Analysis, Planning & Control training course is suitable to a wide range of professionals, but will greatly benefit:

- Financial officers, controllers, and accountants
- Treasurers, corporate planning and business development professionals
- Sales and marketing professionals

Managers from any other non-financial areas that need or wish to understand the financial aspects of analysis, planning, and control

Managers involved in financial decision makings

Middle and junior management involved in planning and forecasting

Methodology

This training course is presented in a very user-friendly course to suit individuals with varying levels of financial knowledge and experience. training course will be conducted along workshop principles with formal presentations, case studies and interactive worked examples. Numerous relevant examples and participative case studies are provided to illustrate the application of each of the topics covered. Each learning point is reinforced with practical examples and participative exercises. Difficult mathematical concepts are minimised wherever possible and handled in a visual way that is easy to understand with numerous illustrative examples.

Course Outline

Day 1: The Challenge of Financial and Economic Decision-Making

Understanding the challenges in financial and economic decision-making.

The practice and principles of financial/economic analysis.

Concepts of a value-creating company.

Corporate value vs. shareholder value.

A dynamic perspective on business operations.

The agency problem and principles of corporate governance.

Identifying the relevant information and data for analysis.

Understanding the nature and role of financial statements.

Contextualising financial analysis for informed decision-making.

Day 2: Assessment of Business Performance

Techniques for assessing overall business performance.

Ratio analysis as a measure of performance.

Perspectives of management, owners, and lenders.

Viewing ratios as an integrated system – pyramids of ratios.

Integrating financial performance analysis across the business.

Economic Value Added (EVA) as a performance measure.

Predicting financial distress using the Z-score model.

Day 3: Analysis of Investment Decisions

Evaluating investment opportunities using time-adjusted measures.
Net Present Value (NPV) and Internal Rate of Return (IRR).
Modified Internal Rate of Return (MIRR).
Strategic considerations in investment decisions.
Relationship between EVA and NPV.
Refinements in investment analysis.
Equivalent Annual Cost (EAC) analysis.
Sensitivity, scenario, simulation, and NPV break-even analysis.
Managing risk and adapting to changing circumstances.
Day 4: Projection of Financial Requirements
Interrelationship of financial projections and planning.
Developing operating budgets.
Standard costing and variance analysis.
Preparing cash forecasts and cash budgets.
Sensitivity analysis for financial planning.
Understanding business dynamics and growth.
Operating leverage and its implications.
Planning financial growth and building financial models.
Day 5: Valuation and Business Performance
Managing for shareholder value creation.
Measuring and enhancing shareholder value.
Evolution of value-based methodologies.
Creating value through restructuring and business combinations.
Financial strategies in mergers and acquisitions.
Business valuation techniques and methodologies.
Approaches to business restructuring and reorganisations.
Management Buy-Outs (MBOs) and Management Buy-Ins (MBIs).

Additional Notes