Strategic Financial Planning and Implementation

7 – 11 June 2027
Rome (Italy)

UK Traininig
PARTNER



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Introduction

In today's rapidly evolving business environment, aligning financial planning with organizational strategy is critical for sustainable growth and long-term value creation. This comprehensive course empowers participants with the knowledge, tools, and practical frameworks to design, implement, and manage strategic financial plans that support corporate objectives and enhance performance across the organization.

Whether you are a finance professional, strategic planner, or senior manager, this course provides you with the essential capabilities to bridge the gap between financial planning and strategic execution.

Course Objectives

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

- Understand the relationship between corporate strategy and financial planning.
- Build long-term financial models and generate strategic forecasts.
- Apply analytical techniques to evaluate investments and funding decisions.
- Design performance measurement systems aligned with strategic goals.
- Communicate financial strategies effectively to key stakeholders.

Course Outlines

Day 1: Fundamentals of Strategic Financial Management

- Overview of strategic financial management principles.
- The role of finance in supporting strategic decision-making.
- Setting financial goals to drive enterprise value.
- Interpreting financial statements from a strategic viewpoint.
- Case study: Analyzing the strategic financial health of an organization.

Day 2: Financial Planning and Forecasting Techniques

- Developing strategic budgets and long-range financial plans.
- Forecasting methodologies and scenario planning.
- Sensitivity analysis and risk assessment in financial projections.
- Constructing integrated financial models.
- Workshop: Creating a strategic financial forecast model.



Day 3: Capital Allocation and Investment Strategies

- Capital structure optimization and funding approaches.
- Strategic investment analysis NPV, IRR, payback period, etc..
- Resource allocation and portfolio management.
- Evaluating investment opportunities under uncertainty.
- Simulation exercise: Making strategic investment decisions.

Day 4: Performance Management and Strategic KPIs

- Linking strategic objectives to performance indicators.
- Designing and implementing balanced scorecards.
- Choosing and interpreting financial and non-financial KPIs.
- Variance analysis and control mechanisms.
- Interactive session: Aligning performance metrics with strategic outcomes.

Day 5: Execution, Communication, and Strategic Oversight

- Rolling forecasts and adaptive planning techniques.
- Communicating the financial plan to internal and external stakeholders.
- Governance, compliance, and risk management in strategic finance.
- Measuring strategic success and learning from failures.
- Final group project: Presenting a comprehensive strategic financial plan.

Why Attend This Course: Wins & Losses!

- Gain a structured approach to linking financial planning with strategy.
- Learn to develop financial models that support long-term decision-making.
- Improve resource allocation, investment analysis, and risk assessment skills.
- Master the use of KPIs to drive organizational performance.
- Enhance your ability to present and defend financial strategies to leadership.
- Benefit from case studies, hands-on workshops, and real-world simulations.
- Walk away with practical tools you can apply immediately in your role.

Conclusion

Strategic financial planning is the cornerstone of value creation, ensuring that vision is translated into results. This course equips participants to think beyond short-term budgeting and towards a holistic approach that integrates financial insight into every aspect of strategic execution.

By mastering these principles, you will be better prepared to navigate change, allocate capital wisely, and contribute to lasting business success.

