



Intro to Data Analytics in Finance

Page 1 of 2

COURSE LENGTH

Two 2-Hour Virtual Sessions or
One Half-Day In-Person

DESCRIPTION

This course equips finance professionals with a structured process for applying data and analytics to real-world financial planning and analysis challenges. Participants will gain a clear understanding of finance-relevant data types and analytics methods, learn to formulate hypotheses and apply structured thinking to data challenges. The course includes practical exercises and demonstrations to reinforce learning and ensure participants can confidently apply data and analytics techniques in their roles.

LEARNING OBJECTIVES

- Apply structured thinking and analytics techniques to solve real-world finance challenges using relevant data types and sources.
- Design and evaluate measurement frameworks and KPIs, leveraging the 4x4 Data Management Framework and strategic data acquisition methods.
- Perform comprehensive analytics across the data continuum—descriptive, diagnostic, predictive and prescriptive—to support financial decision-making.

- Build and communicate data models, such as cash forecasting, using visualization, storytelling and audience-tailored messaging.
- Interpret analytics results responsibly, addressing limitations, risks and ethical considerations in data-driven recommendations.

AGENDA

- Digital Transformation in Finance
 - Understand how analytics, RPA, co-pilots and AI agents are reshaping financial planning and analysis to support smarter, faster decision-making
- Structured Problem Framing
 - Learn to frame business challenges using structured thinking and hypothesis-driven approaches that guide effective data analysis
- Data Types, Sources and Acquisition
 - Identify key finance data types and sources and apply strategic techniques to acquire and manage high-quality, relevant data
- KPI and Measurement Framework Design
 - Design enterprise-aligned KPIs and measurement frameworks that translate strategic goals into actionable performance metrics

Continued on next page



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Page 2 of 2

- Analytics Across the Measurement Continuum
 - Apply descriptive, diagnostic, predictive and prescriptive analytics techniques to uncover insights and drive financial strategy
- Financial Data Modeling
 - Build and interpret financial data models such as cash forecasting using collaborative exercises and structured variable selection
- Insight Communication and Visualization
 - Use data storytelling and visualization best practices to present insights clearly and persuasively to diverse audiences
- Responsible Analytics Interpretation
 - Explain model results transparently, addressing limitations, risks and ethical considerations to ensure responsible data use