



Strategic FP&A: Applying Critical Thinking to Business Strategy

Page 1 of 2

COURSE LENGTH

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

DESCRIPTION

Finance professionals today must go beyond reporting numbers, they are expected to deliver strategic insights that shape business decisions. This course integrates critical thinking, systems thinking and FP&A strategy to equip participants with the tools to analyze financial data, evaluate decisions and communicate insights effectively. Through hands-on exercises and real-world case studies, participants will learn to identify trends, apply decision frameworks and present compelling financial narratives that support sustainable business growth.

LEARNING OBJECTIVES

- Recognize trends within financial data to determine potential actions and conclusions.
- Apply systems thinking and decision analysis frameworks to financial problems.
- Understand the strategic role of FP&A in business growth and governance.
- Identify and communicate key performance indicators (KPIs) essential to business success.

- Professionally present data analysis and prepare reports that clearly communicate key messages.
- Design effective presentations tailored to specific audiences.

AGENDA

- Module 1: Foundations of Strategic Thinking
 - Critical thinking in finance
 - Key virtues and habits of strategic thinkers
 - Overview of business strategy and decision-making
- Module 2: Governance and Values in Financial Strategy
 - Ineffective governance and its impact on growth
 - Identifying firm values and aligning decisions
 - Core moral principles in financial decision-making
 - Live demos
- Module 3: Systems Thinking and Situational Awareness
 - Defining systems and feedback loops
 - Applying situational awareness in financial contexts
 - The 3 Ps: Perspective, Process and Profits

Continued on next page



Strategic FP&A: Applying Critical Thinking to Business Strategy

Page 2 of 2



- Module 4: Decision Analysis Frameworks
 - Introduction to decision theory
 - Evaluating options and outcomes
 - Acquisition, financing and asset management decisions
- Module 5: Financial Goal Setting & KPI Dashboards
 - Shareholder vs. stakeholder theory
 - Wealth maximization and value creation
 - KPI dashboard: profit cycle and analytics
- Module 6: Practical Data Analysis
 - Defining variables and data types
 - Descriptive statistics and visualizations
 - Scatterplots, regression and moving averages
- Module 7: Crafting Analyst Reports & Presentations
 - Structuring reports for clarity and impact
 - Writing executive summaries and memoranda
 - Designing effective PowerPoint slides
- Module 8: Integrated Case Study
 - Applying course concepts to a real-world scenario
 - Group analysis and presentation