



Strategic FP&A Through Analytical Reasoning and AI

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COURSE LENGTH

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

DESCRIPTION

This seminar is designed to strengthen the critical thinking and analytical reasoning skills of FP&A professionals, with a strong emphasis on the role of artificial intelligence in financial planning and decision-making. The course blends foundational reasoning frameworks with practical AI applications in forecasting, scenario planning, and strategy development. Participants will gain tools to critically evaluate AI outputs, enhance their ability to influence business strategy and expand their impact as strategic partners in their organizations.

LEARNING OBJECTIVES

- Apply structured analytical reasoning to strategic FP&A decision scenarios.
- Critically evaluate AI-driven recommendations within financial forecasting, planning and performance management contexts.
- Use decision theory and systems thinking to guide strategic choices and navigate uncertainty in FP&A environments.

- Translate data and AI insights into actionable strategies that advance organizational goals and long-term value creation.
- Design and assess KPI dashboards that focus on value-added insights for executive decision-making and strategic alignment.

AGENDA

- Introduction to the FP&A Landscape
 - Navigating the AI Era
 - Understand how AI is reshaping financial planning and analysis and what it means for decision-making
- Core Elements of Analytical Reasoning
 - Intellectual Virtues, Systems Thinking and Feedback Loops
 - Build foundational reasoning skills essential for interpreting data and making sound judgments
- Decision Theory for FP&A
 - Navigating Uncertainty with Probability-Based Reasoning
 - Apply decision theory to financial scenarios, emphasizing risk, uncertainty and probabilistic thinking

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- Strategy Framework for FP&A
 - Aligning Financial Plans, Value-Add Analysis and Profit Drivers
 - Learn how to connect financial planning with strategic goals and performance metrics
- Evaluating AI Outputs
 - Interpreting Forecasts, Spotting Biases and Errors
 - Develop critical skills for assessing AI-generated insights and avoiding common pitfalls
- Leveraging AI for Strategic Analysis
 - Predictive Analytics & Variance Analysis
 - Use AI tools to enhance strategic forecasting and performance evaluation
- KPI Dashboards and Decision Support
 - Designing Effective, Insightful Dashboards
 - Explore best practices for building dashboards that support strategic decisions
- Workshop: Strategy Under Uncertainty
 - Scenario Planning with Reasoning + AI
 - Apply strategic frameworks and AI tools to navigate complex, uncertain environments
- Wrap-Up and Reflection
 - Key Takeaways and Next Steps
 - Reflect on learnings and discuss how to apply them in your FP&A role