MERCURY

Advanced Business Analysis and Financial Statistics

21 June – 2 July 2027
Munich (Germany)



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Ref: 15973_1000696 **Date:** 21 June – 2 July 2027 **Location:** Munich (Germany) **Fees:** 9500 Euro

Advanced business analysis and financial statistics combine structured problem analysis with regression, forecasting and financial modeling, so that a business case rests on tested numbers rather than opinion. This 2-week course is for analysts, finance staff and managers who already work with business and financial data, and you leave with a Business Performance Analysis Model. This advanced business analysis course is delivered by Mercury Training Center.

About This Course

Many reports describe what happened but cannot say why, or what will happen next. You should already read financial statements and work with spreadsheets. Over two weeks you move from framing the problem to testing it statistically, modeling the finances and recommending action, practicing each step on case data and then on your own figures.

Who It Is For

- Business analysts who investigate performance problems and recommend changes.
- Financial analysts and FP&A staff who build forecasts, budgets and variance reports.
- Managers who decide on investments, cost cuts or pricing and need the evidence behind them.
- Data analysts who want to add statistical testing and financial context to their work.
- Consultants and business owners who assess the financial health of an organization.

This course is not for readers new to financial statements and spreadsheets, who will get more from a shorter foundation course in business analysis and financial statistics, nor for statisticians seeking theory and proofs, who suit an academic statistics course.

Competencies You Will Build

- Problem Framing: you define the business question with SWOT, PESTLE and root cause analysis before touching data.
- Data Preparation: you collect, clean, validate and structure data so the analysis can be trusted.
- Statistical Testing: you use regression, correlation and hypothesis tests to confirm what drives results.
- Financial Statement Analysis: you read the three statements together and judge profitability, liquidity and solvency.
- Forecasting and Modeling: you build forecasts, budgets and dynamic models with scenarios and risks.
- Evidence-Based Recommendation: you turn results into clear proposals for efficiency and profit.

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What You Will Be Able to Do

By the end of the course you will be able to:

- From a business problem statement, apply SWOT, PESTLE and root cause analysis to set the questions to test.
- Given raw sales and cost data, clean and structure a dataset ready for statistical analysis.
- Using regression and hypothesis testing, show which factors drive revenue or cost and by how much.
- From three years of financial statements, run ratio, vertical and horizontal analysis and rate financial health.
- Given a trend and planned changes, build a forecast and budget with best, base and worst scenarios.
- Using a dynamic financial model, test a proposal's risks and present a recommendation to decision makers.

Course Content

Day 1: Business Analysis Fundamentals

- Business Analyst Role and Key Activities in an Organization
- SWOT Analysis for Internal Strengths and Weaknesses
- PESTLE Analysis for External Factors
- Root Cause Analysis for Recurring Business Problems
- Framing Decisions and Questions That Analysis Must Answer

Day 2: Data Collection and Organization

- Qualitative and Quantitative Data Collection Methods
- Reliable Sources: Surveys, Databases and Financial Statements
- Data Cleaning for Errors, Gaps and Inconsistencies
- Organizing Data in Spreadsheets and Databases
- Bias Checks in Data Collection

Day 3: Data Preparation for Analysis

- Data Validation and Verification Procedures
- Formatting and Structuring Data for Statistical Tools
- Combining Data From Multiple Sources
- Tools for Efficient Data Preparation and Automation
- Effect of Preparation Quality on Business Insights

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Day 4: Statistical Tools for Business

- Descriptive Statistics and Distributions for Business Data
- Correlation Analysis Between Business Variables
- Hypothesis Testing for Business Claims
- Sampling Methods for Business Research
- Trend and Pattern Analysis in Time Series

Day 5: Regression and Data Interpretation

- Simple and Multiple Regression for Revenue and Cost Drivers
- Testing Assumptions With Current Data
- Interpreting Results Without Overstating Them
- Validating Interpretations and Spotting Bias
- Data-Driven Decision Making in Practice

Day 6: Financial Statements and Metrics

- Balance Sheet, Income Statement and Cash Flow Statement Links
- ROI, ROE and Profitability Ratios
- Liquidity and Solvency Ratios
- Vertical and Horizontal Analysis Over Several Periods
- Performance Comparison Against Peers and Targets

Day 7: Financial Health and Performance Evaluation

- Financial Health Scorecard From Key Indicators
- Performance Evaluation Using Ratio Trends
- Cost Control and Efficiency Analysis
- Financial Analysis in Business Decisions
- Recommendations for Financial Improvement

Day 8: Forecasting and Budgeting

- Moving Average and Regression-Based Forecasts
- Budget Building, Resource Allocation and Cost Control
- Scenario Planning and Stress Testing of Forecasts
- Risk Anticipation From Forecast Ranges
- Reforecasting When Business Conditions Change

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Day 9: Financial Modeling and Risk

- Principles and Structure of a Dynamic Financial Model
- Building Models in Spreadsheet Software
- Sensitivity Analysis of Key Assumptions
- Linking Financial Models to Business Strategy
- Data Visualization of Model Results for Decision Makers

Day 10: Integrated Analysis Practice

- Exercise: Root Cause and Regression Analysis of a Margin Decline
- Exercise: Financial Health Review of a Three-Year Statement Set
- Exercise: Scenario Forecast and Budget for a Growth Proposal
- Exercise: Presenting a Recommendation to a Decision Panel
- Completing the Business Performance Analysis Model for Your Own Data

Case Studies and Exercises

These are suggested activities.

- Case study: a retail chain sees margins fall while sales rise; you find the cost drivers with regression and recommend changes.
- Case study: a manufacturing firm considers a new production line; you model cash flows, test scenarios and give a decision.
- Exercise: a hospital group's financial statements show rising costs; you run ratio and trend analysis and rate its financial health.
- Exercise: a logistics company needs next year's budget; you build a forecast with best, base and worst cases.

What You Take Back

You return with the Business Performance Analysis Model built on your own organization's data. In your first month back, use it to test one live business question, refresh the forecast with current figures and present the findings and recommendation to your manager.

- Problem framing with SWOT, PESTLE and root cause notes.
- Cleaned dataset with regression and hypothesis test results.
- Financial health scorecard with ratio and trend analysis.
- Scenario forecast, budget and dynamic financial model.

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Quick Answers FAQ

What should I know before advanced business analysis and financial statistics training?

You should already read financial statements and use spreadsheets with formulas and charts. Basic statistics such as averages help; regression and hypothesis testing are built up step by step.

How does the advanced business analysis and financial statistics course differ from the foundation version?

The foundation version introduces business analysis methods and financial statistics over one week. The advanced two-week edition goes further into regression, forecasting, dynamic financial models and full performance evaluation, with case practice at each stage and a model built on your own data.

Why use regression in business and financial analysis?

Regression shows how much each factor, such as price, volume or headcount, moves revenue or cost, and how reliable that link is. It replaces guesswork about causes with measured effects you can test and explain.

What do I take back from advanced business analysis and financial statistics training?

You take back the Business Performance Analysis Model: problem framing notes, a cleaned dataset with statistical tests, a financial health scorecard and a scenario forecast and model, built on your own data.

For Your Manager

After the course, the team member can frame business problems, prepare and test data statistically, analyze financial statements and build forecasts and dynamic financial models. They return with a Business Performance Analysis Model based on your figures, first used to test a live business question and support the next budget or investment decision.