



Strategic FP&A Leadership for CFOs & Finance Directors

7 – 11 June 2027
New York (USA)



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Ref: 121491_1034893 **Date:** 7 – 11 June 2027 **Location:** New York (USA) **Fees:** 7900 Euro

Introduction

The Strategic FP&A Leadership for CFOs & Finance Directors course strengthens financial leadership, decision-making, and performance management across the organization. It helps finance leaders move beyond routine reporting and build a more strategic approach to financial planning and analysis. It focuses on how FP&A teams support executive direction through forecasting, budgeting, variance analysis, and management reporting. The program develops the ability to convert complex financial data into clear insights that guide action. Participants will explore how to use Power BI and Excel dashboards to improve visibility, speed, and control in financial analysis. It supports stronger financial storytelling, sharper business partnering, and more confident leadership in dynamic business environments.

Targeted Groups

This Strategic FP&A Leadership for CFOs & Finance Directors training targets professionals seeking knowledge and skills:

- FP&A Directors.
- CFOs.
- Finance Directors.
- Senior Finance Managers.
- Financial Planning leaders.
- Budgeting and forecasting teams.
- Business performance managers.
- Executive finance decision-makers.

Course Objectives

Participants will achieve the following objectives by completing the Strategic FP&A Leadership for CFOs & Finance Directors course:

- Understand the strategic role of FP&A in finance leadership.
- Strengthen financial planning and analysis capability.
- Improve budgeting and forecasting methods.
- Apply variance analysis to support decisions.
- Build executive-ready management reports.
- Use financial storytelling to present insights clearly.
- Design Power BI dashboards to improve financial visibility.
- Build Excel dashboards for tracking performance.
- Support CFO-level planning with stronger control.

- Align financial analysis with business strategy.

Targeted Competencies

Participants will gain the following competencies during the Strategic FP&A Leadership for CFOs & Finance Directors program:

- Strategic FP&A thinking.
- Financial analysis and interpretation.
- Leadership in finance governance.
- Forecasting and planning discipline.
- Dashboard design for executives.
- Data visualization for decision support.
- Communication of financial insight.
- Business partnering with senior management.

Studying Scenarios

In this Strategic FP&A Leadership for CFOs & Finance Directors training, participants develop skills through the following scenarios:

- Reviewing monthly performance gaps.
- Explaining forecast changes to executives.
- Building a board-level dashboard.
- Assessing cost pressures and risks.
- Recommending action through financial insight.

Course Content

Unit 1: Strategic FP&A Foundations for Finance Leaders

- The role of FP&A in modern finance leadership.
- How CFOs use FP&A to shape business direction.
- The difference between reporting, analysis, and strategic advisory.
- The value of finance business partnering at the executive level.
- Key FP&A responsibilities in high-performing organizations.
- Strategic financial planning as a leadership discipline.
- The link between financial control and business growth.

Unit 2: Financial Storytelling, Reporting, and Performance Review

- Turning raw financial data into meaningful executive insight.
- Building clear management reports for senior leaders.
- Reading income, cost, margin, and cash signals together.
- Using variance analysis to explain performance movements.
- Identifying drivers behind budget gaps and forecast shifts.
- Presenting financial results with clarity and confidence.
- Connecting performance trends with strategic priorities.
- Framing numbers as decisions, risks, and opportunities.
- Strengthening monthly and quarterly review meetings.
- Creating a consistent financial storytelling structure.
- Highlighting what changed, why it changed, and what follows.
- Improving communication between finance and operations.
- Supporting better executive decisions through focused analysis.

Unit 3: Budgeting, Forecasting, and Scenario Planning

- Building strategic budgets that reflect business goals.
- Creating rolling forecasts for faster leadership response.
- Improving forecast accuracy through driver-based thinking.
- Linking revenue assumptions to market and operational realities.
- Modeling expenses with discipline and accountability.
- Using scenario planning to test multiple business outcomes.
- Stress-testing assumptions under growth, inflation, or risk pressure.
- Comparing plan, forecast, and actual performance clearly.
- Managing the financial impact of strategic decisions.
- Aligning budgeting cycles with executive planning needs.
- Strengthening forecast ownership across departments.
- Identifying early warning signals in financial plans.
- Improving confidence in long-term financial outlooks.
- Supporting CFO oversight with structured planning logic.

Unit 4: Power BI Dashboards for FP&A Leadership

- Designing Power BI dashboards for executive finance use.
- Selecting KPIs that matter for strategic decision-making.
- Organizing financial and operational data for visibility.
- Building dashboards that show trends, exceptions, and priorities.
- Using visuals to simplify complex financial relationships.
- Tracking profitability, liquidity, and cost performance.
- Comparing actuals, budget, and forecast in one view.
- Creating drill-down logic for deeper analysis.
- Presenting monthly finance performance through interactive views.
- Supporting faster insight discovery across business units.
- Improving communication with real-time dashboard reporting.
- Standardizing reporting formats for leadership review.
- Enhancing FP&A productivity through visual analytics.
- Connecting Power BI outputs to management action.
- Making finance reporting more usable for executives.

Unit 5: Excel Dashboards, Leadership Discipline, and Executive Decision Support

- Building practical Excel dashboards for FP&A tracking.
- Using Excel models to support planning and analysis.
- Structuring sheets for control, transparency, and consistency.
- Automating recurring finance views for faster reporting.
- Managing data accuracy in leadership reports.
- Comparing financial performance across business segments.
- Supporting investment, cost, and growth decisions.
- Strengthening financial governance through disciplined analysis.
- Leading FP&A teams with clarity and accountability.
- Advising CFOs and Finance Directors with evidence-based insight.
- Improving board-ready reporting through structured financial output.
- Linking dashboard analysis to strategic management action.
- Building confidence in executive presentations.
- Creating a finance function that supports decision speed.
- Advancing strategic FP&A leadership across the organization.

Final Insights & Key Takeaways

Strategic FP&A Leadership for CFOs & Finance Directors strengthens the ability to guide business performance through disciplined analysis, clear reporting, and confident executive partnership. It also equips finance leaders to use Power BI and Excel dashboards to turn financial data into a practical strategic direction.