



Finance Business Partner Management Skills Excellence

26 – 30 July 2027
Lisbon (Portugal)



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Ref: 121818_1053049 **Date:** 26 – 30 July 2027 **Location:** Lisbon (Portugal) **Fees:** 5600 Euro

Introduction

The Finance Business Partner Management Skills Excellence course develops advanced capabilities for finance professionals who aim to become strategic partners in organizational decision-making. It explores the evolving role of finance business partners in connecting financial insights with business strategy, operational performance, and sustainable growth. Participants will gain knowledge of financial analysis, stakeholder management, performance improvement, and strategic communication techniques. The program focuses on enhancing the ability to translate financial data into meaningful recommendations that support leadership decisions. It examines approaches for building collaborative relationships between finance teams and business functions. Participants will understand how effective finance business partnering contributes to improved business performance, risk management, and long-term organizational value creation.

Targeted Groups

This Finance Business Partner Management Skills Excellence training targets professionals seeking knowledge and skills:

- Finance managers are improving strategic business support capabilities.
- Financial analysts are developing business partnership expertise.
- Accountants are expanding their advisory and communication skills.
- Budget professionals are enhancing their financial planning abilities.
- Business managers are strengthening their financial decision-making knowledge.
- Department leaders are collaborating with finance teams.
- Professionals preparing for strategic finance roles.

Course Objectives

Participants will achieve the following objectives by completing the Finance Business Partner Management Skills Excellence course:

- Understand the strategic role of finance business partners in modern organizations.
- Develop skills to connect financial analysis with business objectives and growth strategies.
- Apply effective financial planning and performance management approaches.
- Interpret financial information to support informed management decisions.
- Build stronger relationships with operational and executive stakeholders.
- Improve communication skills for presenting financial insights clearly.
- Analyze business challenges using financial data and strategic thinking.
- Enhance forecasting, budgeting, and financial control capabilities.
- Support organizational transformation through value-driven finance practices.
- Evaluate performance indicators and identify opportunities for improvement.
- Strengthen negotiation and influencing skills across business functions.
- Apply problem-solving methods to address financial and operational issues.
- Develop leadership capabilities required for finance advisory positions.
- Promote collaboration between finance departments and business units.
- Create practical recommendations that improve business performance and efficiency.

Targeted Competencies

Participants will gain the following competencies during the Finance Business Partner Management Skills Excellence program:

- Strategic financial analysis and business performance evaluation.
- Effective stakeholder communication and relationship management.
- Business-focused financial planning and forecasting skills.
- Decision support using financial insights and analytics.
- Value creation through finance partnership approaches.
- Advanced budgeting and performance monitoring capabilities.
- Influencing leadership decisions with financial recommendations.
- Cross-functional collaboration and advisory skills.
- Risk identification and financial problem-solving abilities.
- Professional presentation of financial information.

Studying Scenarios

In this Finance Business Partner Management Skills Excellence training, participants develop skills through the following scenarios:

- Supporting management decisions using financial analysis and business insights.
- Improving departmental performance through budgeting and forecasting reviews.
- Managing stakeholder discussions during strategic planning processes.
- Evaluating business cases through financial impact assessment.
- Resolving operational challenges using finance partnership approaches.
- Presenting financial recommendations to executive leadership teams.

Course Content

Unit 1: Fundamentals of Finance Business Partnering

- Understanding the evolution of the finance business partner role.
- Exploring the difference between traditional finance and strategic finance functions.
- Recognizing the importance of finance transformation in modern organizations.
- Understanding how finance professionals contribute to business growth strategies.
- Examining the relationship between financial management and operational performance.
- Identifying the responsibilities of effective finance business partners.
- Developing a mindset focused on value creation and strategic contribution.

Unit 2: Strategic Financial Analysis and Business Decision Support

- Understanding financial analysis techniques for business performance evaluation.
- Interpreting financial statements to identify business opportunities and challenges.
- Applying financial metrics to measure organizational performance.
- Using financial insights to support strategic decision-making processes.
- Evaluating profitability, efficiency, and operational improvement opportunities.
- Developing financial recommendations based on business objectives.
- Connecting financial data with business strategy and market conditions.
- Understanding the role of management reporting in decision support.

Unit 3: Business Planning, Budgeting, and Performance Management

- Understanding strategic business planning and financial alignment.
- Developing effective budgeting approaches that support organizational goals.
- Exploring forecasting techniques for improved financial visibility.
- Managing budget discussions with business stakeholders.
- Analyzing budget variances and identifying improvement actions.
- Applying performance management principles to financial operations.
- Establishing meaningful key performance indicators for business monitoring.
- Supporting continuous improvement through financial performance reviews.

Unit 4: Stakeholder Management and Strategic Communication Skills

- Understanding stakeholder expectations within finance business partnering.
- Developing communication techniques for presenting financial information effectively.
- Building trust-based relationships between finance and business teams.
- Translating complex financial concepts into clear business messages.
- Improving influencing skills to support strategic recommendations.
- Managing challenging discussions related to financial performance.
- Strengthening collaboration between finance professionals and operational leaders.
- Applying negotiation techniques during business planning discussions.

Unit 5: Advanced Finance Business Partnering for Organizational Growth

- Understanding how finance business partners support organizational transformation.
- Applying strategic thinking to identify business improvement opportunities.
- Using financial insights to enhance competitive advantage.
- Supporting investment decisions through financial evaluation approaches.
- Managing risks through proactive financial analysis.
- Developing leadership capabilities for strategic finance roles.
- Creating sustainable value through effective finance partnership practices.
- Enhancing the finance team's contribution to long-term business success.

Final Insights & Key Takeaways

The course equips professionals with the strategic capabilities needed to connect financial expertise with business growth and leadership decisions. Participants develop advanced finance business partnering skills that enhance collaboration, performance improvement, and value creation across organizations.