MERCURY

Financial Data Analytics for Strategic Finance Decisions

25 – 29 January 2027
Johannesburg (South Africa)



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Financial Data Analytics for Strategic Finance Decisions

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Introduction

The Financial Data Analytics for Strategic Finance Decisions course equips finance professionals with the analytical knowledge needed to transform financial data into actionable business insights. It covers financial data collection, preparation, visualization, interpretation, and modeling to strengthen strategic planning and decision-making. Participants examine analytical methods for profitability, cash flow, budgeting, forecasting, cost management, performance measurement, and investment evaluation. The program develops understanding of financial dashboards, key performance indicators, variance analysis, scenario analysis, and predictive techniques. It emphasizes connecting financial analytics with business strategy, risk management, resource allocation, and organizational performance. Participants learn to evaluate financial evidence, communicate findings clearly, and support informed finance decisions.

Targeted Groups

This Financial Data Analytics for Strategic Finance Decisions training targets professionals seeking knowledge and skills:

- Finance managers strengthening financial analysis and strategic planning.
- Financial analysts improving data-driven business decisions.
- Accountants developing advanced financial reporting insights.
- FP&A professionals enhancing budgeting and forecasting accuracy.
- Controllers evaluating financial performance and cost trends.
- Treasury professionals analyzing cash flow and liquidity data.
- Business managers interpreting financial information for strategic decisions.
- Executives seeking stronger evidence-based financial decision-making capabilities.

Course Objectives

Participants will achieve the following objectives by completing the Financial Data Analytics for Strategic Finance Decisions course:

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- Explain financial data analytics and its strategic finance applications.
- Evaluate financial data quality, consistency, relevance, and structure.
- Analyze profitability, liquidity, cash flow, and performance data.
- Interpret financial statements and key performance indicators effectively.
- Assess budgeting, forecasting, and variance information for decisions.
- Develop meaningful financial KPIs for performance monitoring.
- Evaluate cost drivers, margins, and operational financial trends.
- Apply scenario analysis and predictive techniques to financial planning.
- Assess investment data and assumptions supporting capital decisions.
- Interpret dashboards and financial visualizations for executive reporting.
- Identify risks, anomalies, trends, and decision-making gaps.
- Translate analytical findings into strategic finance recommendations.
- Communicate financial insights clearly to decision-makers and stakeholders.

Targeted Competencies

Participants will gain the following competencies during the Financial Data Analytics for Strategic Finance Decisions program:

- Financial data interpretation and analytical reasoning.
- Financial statement analysis and performance evaluation.
- Budgeting, forecasting, and variance analysis.
- Financial KPI selection and monitoring.
- Profitability, margin, and cost-driver analysis.
- Cash flow and liquidity assessment.
- Scenario analysis and financial modeling.
- Predictive financial analysis and trend interpretation.
- Dashboard interpretation and financial visualization.
- Data quality assessment and analytical validation.
- Strategic resource allocation and investment evaluation.

Real-world Case Studies

In this Financial Data Analytics for Strategic Finance Decisions training, participants develop skills through the following cases:

- Multinational corporations analyze product profitability to improve resource allocation.
- Manufacturing companies examine budget variances and cost trends to strengthen forecasting.
- Service organizations evaluate cash flow patterns to improve working capital decisions.
- Finance departments compare investment scenarios using sensitivity analysis.

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Course Content

Unit 1: Financial Data Analytics Foundations

- Define financial data analytics and its role in strategic finance.
- Distinguish descriptive, diagnostic, predictive, and prescriptive analytics.
- Identify structured and unstructured financial data sources.
- Examine statements, budgets, transactions, and operational records.
- Assess data quality, accuracy, consistency, timeliness, and relevance.
- Establish analytical questions linked to business objectives.
- Recognize data governance principles for reliable financial analysis.
- Evaluate analytical results against business and financial priorities.

Unit 2: Financial Performance and Management Analysis

- Analyze income statements, revenues, expenses, margins, and profitability.
- Interpret balance sheets and assess financial position and capital structure.
- Examine cash flow from operating, investing, and financing activities.
- Calculate liquidity, efficiency, leverage, and profitability ratios.
- Analyze cost behavior, cost drivers, margins, and break-even points.
- Compare performance across periods, units, products, and markets.
- Evaluate returns, capital efficiency, and business value.
- Interpret trends to identify performance strengths and gaps.

Unit 3: Budgeting, Forecasting, and Financial Modeling

- Analyze historical data to identify financial trends and patterns.
- Compare budgets with actual results through variance analysis.
- Interpret favorable and unfavorable variances and their drivers.
- Apply rolling forecasts to improve financial planning.
- Develop models using assumptions, drivers, and scenario variables.
- Use sensitivity analysis to evaluate changes in financial outcomes.
- Assess forecasting accuracy using projected and actual results.
- Integrate operational drivers into financial forecasts and planning models.

Unit 4: Financial Dashboards, KPIs, and Predictive Analytics

- Select financial KPIs aligned with strategic objectives.
- Design dashboards that clearly present financial performance.
- Interpret charts, trends, benchmarks, and financial visualizations.
- Apply predictive analytics to revenue, costs, and cash flow trends.
- Identify anomalies, outliers, and emerging financial risks.
- Distinguish correlation, causation, and uncertainty in financial analysis.
- Assess KPI trends for early performance signals.
- Present financial insights through concise executive narratives.

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Unit 5: Strategic Finance Decisions and Business Value

- Connect financial analytics with strategy and business planning.
- Evaluate investments using returns, cash flows, risks, and assumptions.
- Analyze working capital to support liquidity decisions.
- Apply scenario analysis to strategic decisions under uncertainty.
- Translate analytical findings into resource allocation recommendations.
- Communicate financial insights through evidence-based executive conclusions.
- Assess financial risks using trends, scenarios, and performance indicators.
- Support strategic decisions with measurable financial outcomes.

Final Insights & Key Takeaways

Financial data analytics transforms financial information into actionable insights for planning, forecasting, performance, and investment decisions. Strong analytical thinking helps finance professionals identify trends, assess risks, optimize resources, and support evidence-based strategic decisions.