MERCURY

Essential Financial Business Partner Skills and Practices

8 – 12 August 2027
Dubai (UAE)



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Essential Financial Business Partner Skills and Practices

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Introduction

Finance business partnering now goes beyond reporting, connecting financial insight with business decisions. This Essential Financial Business Partner Skills and Practices course develops the skills needed to interpret performance, evaluate business drivers, and support informed management decisions. Participants examine financial analysis, budgeting, forecasting, financial modeling, performance management, and strategic decision support in a business-partnering context. The program develops commercial awareness, stakeholder management, communication, and influencing skills for effective finance partnering. Participants learn to turn financial information into actionable recommendations while considering operational realities, risks, and strategic priorities. These capabilities support the modern finance business partner's role in analysis, commercial judgment, and decision-making.

Targeted Groups

This Essential Financial Business Partner Skills and Practices training targets professionals seeking knowledge and skills:

- Finance managers and business partners.
- Management accountants and FP&A professionals.
- Financial analysts and commercial finance specialists.
- Budgeting and forecasting professionals.
- Senior accountants pursuing strategic finance roles.
- Finance leaders supporting operational teams.
- Professionals preparing senior management analysis.
- Managers developing communication and influencing skills.

Course Objectives

Participants will achieve the following objectives by completing the Essential Financial Business Partner Skills and Practices course:

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- Explain the role of a finance business partner in strategic and operational decision-making.
- Interpret financial statements, performance indicators, budgets, forecasts, and business drivers.
- Analyze financial and operational data to identify trends, risks, opportunities, and root causes.
- Apply financial analysis techniques to support pricing, profitability, investment, and resource decisions.
- Develop financial models for scenario analysis, forecasting, and business planning.
- Translate financial information into clear, concise, decision-focused insights.
- Strengthen communication with non-finance stakeholders through structured financial storytelling.
- Apply stakeholder management and influencing techniques during business discussions.
- Evaluate business cases using financial, operational, commercial, and strategic considerations.
- Support performance management through relevant KPIs, variance analysis, and action-oriented recommendations.
- Integrate financial insight with strategic priorities, operational realities, and organizational objectives.

Targeted Competencies

Participants will gain the following competencies during the Essential Financial Business Partner Skills and Practices program:

- Financial analysis.
- Commercial awareness.
- Budgeting and forecasting.
- Financial modeling.
- KPI management.
- Strategic decision support.
- Stakeholder management.
- Influencing skills.
- Financial storytelling.
- Problem-solving.
- Risk assessment.
- Cross-functional collaboration.

Real-world Case Studies

In this Essential Financial Business Partner Skills and Practices training, participants develop skills through the following cases:

- A retail company analyzes declining margins and identifies pricing, volume, and cost drivers.
- Within manufacturing, a company evaluates a capital investment using cash flows, scenarios, and strategic fit.
- Across sales operations, a division reviews forecast gaps and develops corrective actions using operational KPIs.

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Course Content

Unit 1: Finance Business Partnering Foundations

- Define the finance business partner role and value.
- Distinguish transactional and strategic finance responsibilities.
- Connect finance with operational teams.
- Identify business drivers and value levers.
- Assess commercial awareness and business acumen.
- Build trusted stakeholder relationships.
- Position finance as a proactive adviser.
- Support value creation and accountability.

Unit 2: Financial Analysis and Business Performance

- Interpret key financial statements and reports.
- Analyze revenue, costs, margins, and profitability.
- Apply variance analysis to performance gaps.
- Select relevant financial KPIs.
- Link operational indicators to financial outcomes.
- Identify trends, risks, and opportunities.
- Compare actual results with targets.
- Assess data quality before analysis.

Unit 3: Planning, Forecasting, and Financial Modeling

- Link budgets, forecasts, and strategic plans.
- Develop driver-based financial forecasts.
- Evaluate forecast accuracy and changes.
- Apply scenario analysis to uncertainty.
- Build models for resource planning.
- Assess business cases, returns, and risks.
- Integrate operational assumptions into forecasts.
- Validate assumptions using historical and current data.

Unit 4: Strategic Decision Support and Commercial Insight

- Translate financial analysis into recommendations.
- Evaluate pricing, investment, and cost decisions.
- Assess commercial and operational risks.
- Apply sensitivity analysis to key assumptions.
- Link recommendations to market and customer needs.
- Support strategic planning and decision-making.
- Prioritize recommendations by impact and urgency.
- Assess short- and long-term consequences.

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Unit 5: Communication, Influence, and Stakeholder Partnership

- Communicate financial insights clearly.
- Use financial storytelling for business decisions.
- Structure concise management presentations.
- Build cross-functional stakeholder relationships.
- Challenge assumptions constructively.
- Facilitate discussions and resolve priorities.
- Adapt communication to different audiences.
- Strengthen trusted-adviser relationships.

Final Insights & Key Takeaways

Effective finance business partnering combines financial expertise, commercial awareness, analytical thinking, and strong stakeholder influence to support better business decisions. The course helps finance professionals move beyond reporting to deliver strategic insight, build trusted advisory relationships, and drive measurable business value.