MERCURY

Mastering Financial Storytelling and Real Estate Development Modeling

28 June – 2 July 2027
Vienna (Austria)



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Ref: 121495_1078814 **Date:** 28 June – 2 July 2027 **Location:** Vienna (Austria) **Fees:** 5900 Euro

Introduction

The Mastering Financial Storytelling and Real Estate Development Modeling course transforms finance professionals into influential strategic partners within their organizations. It focuses on advancing financial planning and analysis capabilities while elevating the ability to communicate insights through compelling narratives. Participants will explore how to translate complex financial data into clear, actionable business stories that support executive decision-making. The program integrates modern tools such as Power BI dashboards and advanced Excel modeling to enhance data visualization and reporting efficiency. It emphasizes real-world case studies that go beyond analysis to include strategic interpretation and business impact. Participants will lead FP&A functions with confidence, clarity, and strategic foresight.

Targeted Groups

This Mastering Financial Storytelling and Real Estate Development Modeling training targets professionals seeking knowledge and skills:

- FP&A Directors leading financial planning functions.
- Chief Financial Officers are driving strategic decisions.
- Senior finance managers oversee budgeting processes.
- Business finance partners supporting executive teams.
- Financial analysts transitioning into leadership roles.
- Corporate strategy professionals working with financial data.
- Controllers seeking advanced reporting and storytelling skills.
- Data-driven managers responsible for performance insights.

Course Objectives

Participants will achieve the following objectives by completing the Mastering Financial Storytelling and Real Estate Development Modeling course:

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- Strengthen strategic financial planning and forecasting capabilities.
- Develop advanced financial storytelling techniques for executives.
- Translate financial analysis into actionable business insights.
- Design impactful Power BI dashboards for performance tracking.
- Build dynamic Excel dashboards for financial reporting.
- Enhance decision-making using data-driven financial models.
- Integrate scenario planning into FP&A processes.
- Communicate financial results with clarity and influence.
- Apply variance analysis to support business strategy.
- Improve budgeting and forecasting accuracy.
- Align financial planning with organizational objectives.
- Interpret key performance indicators for strategic outcomes.
- Leverage data visualization tools for executive reporting.
- Evaluate financial risks and opportunities effectively.

Targeted Competencies

Participants will gain the following competencies during the Mastering Financial Storytelling and Real Estate Development Modeling program:

- Strategic financial thinking and planning expertise.
- Advanced financial modeling and forecasting skills.
- Data storytelling and executive communication abilities.
- Dashboard design using Power BI and Excel.
- Business performance analysis and interpretation.
- Scenario analysis and decision support capabilities.
- Financial data visualization and reporting proficiency.
- Budgeting and variance analysis expertise.
- Cross-functional collaboration and advisory skills.
- Insight generation from complex financial datasets.

Studying Scenarios

In this Mastering Financial Storytelling and Real Estate Development Modeling training, participants develop skills through the following scenarios:

- Presenting financial performance to executive boards.
- Building interactive dashboards for business units.
- Analyzing budget deviations and recommending actions.
- Supporting strategic investment decisions with financial insights.
- Creating financial narratives for business transformation initiatives.
- Evaluating business performance using real-world case studies.

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Course Content

Unit 1: Real Estate Development Modeling:

- Structuring models for ground-up development projects.
- Modeling land acquisition, soft costs, and hard costs.
- Estimating timelines and development milestones.
- Integrating construction loans and draw schedules.
- Forecasting lease-up periods and stabilization income.
- Modeling exit strategies, including sales and refinancing.
- Evaluating developer profit and return metrics.
- Accounting for cost overruns and construction risks.
- Preparing a comprehensive development pro forma.

Unit 2: Financial Storytelling for Executive Impact

- Principles of financial storytelling in business contexts.
- Structuring financial narratives for clarity and persuasion.
- Translating data into meaningful business insights.
- Communicating financial results to non-financial stakeholders.
- Crafting compelling presentations for senior leadership.
- Using storytelling frameworks in financial reporting.
- Avoiding common pitfalls in financial communication.
- Linking financial outcomes to strategic objectives.

Unit 3: Advanced Financial Modeling & Analysis

- Building robust financial models for forecasting.
- Techniques for dynamic budgeting and rolling forecasts.
- Conducting variance analysis and performance tracking.
- Scenario planning and sensitivity analysis.
- Identifying key performance indicators for business growth.
- Forecasting revenue, costs, and profitability.
- Evaluating financial risks and opportunities.
- Enhancing accuracy in financial projections.

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Unit 4: Advanced Techniques and Best Practices:

- Using dynamic formulas and named ranges in Excel.
- Building model dashboards for executive reporting.
- Creating dynamic charts and visualization tools.
- Error checking, auditing, and troubleshooting models.
- Version control and documentation best practices.
- Integrating macroeconomic data and market indicators.
- Enhancing the presentation of models for investors.
- Modeling sustainability and ESG considerations.
- Case study: Full-cycle real estate investment model.

Unit 5: Case Studies in Strategic Financial Decision-Making

- Case study on business expansion financial analysis.
- Case study on cost optimization strategies.
- Case study on investment evaluation and ROI analysis.
- Case study on financial restructuring and turnaround.
- Interpreting financial data to guide strategic decisions.
- Presenting recommendations based on financial insights.
- Applying storytelling techniques in real-world scenarios.
- Evaluating outcomes and lessons learned from case studies.

Final Insights & Key Takeaways

Strategic FP&A leadership requires more than technical expertise; it demands the ability to influence decisions through clear and compelling financial storytelling. Mastering data visualization tools and real-world case analysis enables finance leaders to drive business performance and strategic success.