MERCURY

The Strategic Financial Planning & Implementation Course

27 September – 1 October 2027
Washington DC (USA)



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Introduction

In today's competitive global marketplace, organizations are increasingly under threat. Coupled with the recent credit crunch and recession in some markets, organizations must look at other ways of protecting their business and margins.

Strategic Financial Planning and Implementation ensures accountability while aligning the business with actionable and achievable goals and objectives. This program will help you to look "outside the box" and be creative and entrepreneurial in your organization.

This strategic financial planning and management course is designed to go beyond the theoretical. In today's dynamic world, linking strategy with financial performance is mandatory.

Strategic financial planning is at the core of every successful business venture. The strategic financial planning and implementation course aims to equip professionals with the skills to create robust strategic financial plans that align with business objectives, offer a sustainable competitive advantage, and ensure organizational agility in response to market dynamics.

Through this specialization, executive professionals and financial planners will learn the fundamentals of financial planning within strategic management. Provides a thorough understanding of the advanced financial planning certificate and the role of certified financial planners in strategic decision-making.

Participants will navigate the nuances of finance and strategic management, gaining insights into the fundamental financial planning processes required for impactful strategic execution.

The strategic financial management course outline is meticulously curated to include practical, actionable strategies that blend theoretical concepts with real-world applications, fostering a holistic approach to strategic financial management.

Targeted Groups

- Executive professionals with strategic and financial responsibilities.
- Senior professionals need to understand the strategic implementation and its financial impact.
- Budgeting team.
- Middle-level professionals in all business areas are impacted and affected by strategic decisions.
- All staff who are accountable for economic performance.

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Course Objectives

At the end of this strategic financial planning and management course, the participants will be able to:

- Understand the concepts of strategic decision-making and its benefits.
- Understand the role of leadership in strategy making.
- Understand the link between involvement and accountability.
- Set creativity and innovation in a strategic context.
- Provide insights into developing implementation plans
- Identify the strategies, tools, and techniques to improve levels of creativity and innovation.
- Know how to create an actionable financial plan with controllable milestones.
- Develop skills for strategic leaders.
- Learn skills to understand and avoid the pitfalls of strategic planning.

Targeted Competencies

- Improved planning, implementation, and results.
- Improved strategic leadership.
- Better utilization of core competencies and recognition of the following competencies are needed.
- Integration of strategy, finance, and operations.
- Realization of sustainable competitive advantage.
- Greater understanding and willingness to change.
- A more substantial commitment to goals and objectives.

Course Content

Unit 1: Strategic and Financial Planning

- The role of strategy in business and why it matters.
- The ingredients of a good plan.
- Customer analysis and market segmentation.
- Effective strategy-making processes with proper financial planning.
- Tools for understanding industry developments.
- The core strategic financial choices for a business.
- Who is responsible for strategy making, and who should be held accountable?

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Unit 2: Integrating Strategic and Financial Planning with Operational Management

- Contrasting management with strategic leadership.
- The competencies of strategic leadership.
- The top manager is a strategist.
- The CFO, as strategist.
- Using scenario analysis and environmental scanning.
- SWOT and other acronyms.
- Corporate culture and its effect on strategy and financial planning.
- The operational manager's role in strategy.

Unit 3: Using Evidence for Strategic and Financial Planning

- Analyzing the marketplace and the customers.
- Understanding the competition.
- Financial analysis: past, present, and future.
- Knowing the core strengths and weaknesses of your business.
- Identifying your core competitive advantage.
- Developing vision statements that make a difference.
- Developing mission statements that make a difference.
- Examining alternative strategies.
- Creating the strategic plan.

Unit 4: Implementing Strategic and Financial Plans

- Using financial planning to prepare the ground for change in the business.
- Communicating the strategy and having control points.
- Overcoming internal political resistance.
- Reviewing and measuring progress with proper variance analysis.
- Turnaround and corrective measures.
- Managing implementation as a continuous process.

Unit 5: Becoming a Leader of Strategic Financial Planning

- Building strategy making and implementation into the role of managers.
- Developing strategic leadership capability.
- Creating organizational commitment to the business strategy.
- Leading strategy-making teams effectively.
- Incentive plans.
- Balanced scorecard and other performance management systems.
- Realistic action planning.