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Global Learning for Operational Leaders



ACCOUNTING AND FINANCE | AF-054

# Financial Planning and Analysis (FP&A) Business Partnering


## Contact

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# Course content

## Why Attend

Finance teams are increasingly expected to do more than report numbers. Business leaders want finance partners who can explain what drives performance, challenge assumptions, model options and help them make better decisions quickly.

This Financial Planning and Analysis Business Partnering training course develops the technical and interpersonal skills needed to move from score-keeping to decision support. Participants strengthen their planning, forecasting, driver-based modelling and variance analysis, and learn to translate financial insight into clear recommendations for operational managers.

## Course Methodology

• The course mixes practical modelling exercises in spreadsheets with role-plays, presentation practice and group discussion. A running case study places participants in the role of a finance partner to a business unit, where they build forecasts, analyse results, prepare insight packs and present recommendations to a simulated leadership team.

## Course Objectives

• Describe the modern FP&A role and the capabilities of an effective finance business partner

• Build driver-based plans and rolling forecasts linked to operational measures

• Carry out insightful variance analysis that explains causes and recommends actions

• Develop scenario and sensitivity models to support business decisions

• Design management reports and dashboards that focus attention on what matters

• Use questioning, listening and influencing skills to engage business leaders

## Target Audience

• FP&A analysts and managers

• Management accountants and financial controllers

• Finance business partners and commercial finance teams

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# Course content

- Budget and planning professionals

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# Course outline

## Detailed course outline

Day-by-day outline for Financial Planning and Analysis (FP&A) Business Partnering.

### Day 1 - The FP&A Business Partner Role

- 09:00-09:30 | Evolution of Finance: From transaction processing to decision support
- 09:30-10:00 | Business Partnering Models: Embedded, centralised and hybrid approaches
- 10:00-10:30 | Capabilities of Effective Partners: Technical, commercial and interpersonal skills
- 10:30-11:00 | Understanding the Business: Value drivers, operating models and key decisions
- 11:00-11:30 | Coffee break
- 11:30-12:30 | Building Credibility: Trust, independence and constructive challenge
- 12:30-13:00 | Self-Assessment: Identifying personal strengths and development areas
- 13:00-14:00 | Case Study: Diagnosing the relationship between finance and a business unit

### Day 2 - Planning and Forecasting

- 09:00-09:54 | Planning Cycle Design: Strategic plans, annual budgets and rolling forecasts
- 09:54-10:21 | Driver-Based Planning: Linking financial outcomes to volumes, prices and productivity
- 10:21-10:48 | Rolling Forecasts: Frequency, horizon and level of detail
- 10:48-11:00 | Forecast Accuracy: Measuring bias and improving reliability
- 11:00-11:30 | Coffee break
- 11:30-11:45 | Forecast Accuracy: Measuring bias and improving reliability (continued)
- 11:45-12:12 | Collaborative Forecasting: Gathering assumptions from operational managers
- 12:12-13:06 | Modelling Good Practice: Structure, transparency and error prevention
- 13:06-14:00 | Practical Exercise: Building a driver-based rolling forecast model

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### Day 3 - Analysis That Drives Decisions

- 09:00-09:34 | Variance Analysis: Price, volume, mix and efficiency effects
- 09:34-10:08 | From Variances to Insight: Finding root causes and asking better questions
- 10:08-10:42 | Profitability Analysis: Customer, product and channel perspectives
- 10:42-11:00 | Scenario and Sensitivity Analysis: Testing assumptions and preparing options
- 11:00-11:30 | Coffee break
- 11:30-11:46 | Scenario and Sensitivity Analysis: Testing assumptions and preparing options (continued)
- 11:46-12:20 | Investment and Business Case Support: Evaluating proposals objectively
- 12:20-12:53 | Using Analytics Tools: Visualisation and self-service data exploration
- 12:53-14:00 | Workshop: Analysing a quarter's results and preparing recommended actions

### Day 4 - Influencing and Communicating Insight

- 09:00-09:27 | Stakeholder Mapping: Understanding the priorities of different leaders
- 09:27-09:54 | Effective Questioning: Uncovering assumptions and business realities
- 09:54-10:48 | Influencing Without Authority: Building agreement and handling disagreement
- 10:48-11:00 | Designing Management Reports: Less data, more insight
- 11:00-11:30 | Coffee break
- 11:30-12:12 | Designing Management Reports: Less data, more insight (continued)
- 12:12-12:39 | Financial Storytelling: Structuring a clear message from complex numbers
- 12:39-13:06 | Handling Difficult Conversations: Challenging plans and delivering bad news
- 13:06-14:00 | Role-Play: Partner meeting with a sceptical operations director

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### Day 5 - Raising the Impact of FP&A

- 09:00-09:34 | Process Efficiency: Reducing time spent on data preparation
- 09:34-10:08 | Technology and Automation: Planning platforms, data integration and AI support
- 10:08-10:42 | Performance Management Frameworks: KPIs, targets and review meetings
- 10:42-11:00 | Measuring Finance Partner Effectiveness: Feedback and value indicators
- 11:00-11:30 | Coffee break
- 11:30-11:46 | Measuring Finance Partner Effectiveness: Feedback and value indicators (continued)
- 11:46-12:53 | Building the Team: Skills development, coaching and career paths
- 12:53-13:27 | Personal Action Plan: Applying course learning in the first ninety days
- 13:27-14:00 | Final Presentation: Delivering an insight pack to a simulated leadership team

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# Seminar dates

## Available seminar dates

Live dates and pricing for Financial Planning and Analysis (FP&A) Business Partnering generated from the course details page.

| Date | Location | Format | Fee |
|---|---|---|---|
| 14 - 18 December 2026 | London | Classroom | **€2,915** |
| 21 - 25 December 2026 | Barcelona | Classroom | **€2,275** |
| 7 - 11 December 2026 | Frankfurt | Classroom | **€2,175** |
| 4 - 8 January 2027 | London | Classroom | **€2,915** |
| 11 - 15 January 2027 | Barcelona | Classroom | **€2,275** |
| 18 - 22 January 2027 | Frankfurt | Classroom | **€2,175** |
| 25 - 29 January 2027 | Paris | Classroom | **€2,810** |
| 8 - 12 February 2027 | London | Classroom | **€2,915** |
| 15 - 19 February 2027 | Barcelona | Classroom | **€2,275** |
| 22 - 26 February 2027 | Frankfurt | Classroom | **€2,175** |

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# Seminar dates

## Available seminar dates

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| Date | Location | Format | Fee |
|---|---|---|---|
| 1 - 5 February 2027 | Rome | Classroom | **€2,830** |
| 15 - 19 March 2027 | London | Classroom | **€2,915** |
| 22 - 26 March 2027 | Barcelona | Classroom | **€2,275** |
| 1 - 5 March 2027 | Frankfurt | Classroom | **€2,175** |
| 8 - 12 March 2027 | Vienna | Classroom | **€3,425** |
| 26 - 30 April 2027 | London | Classroom | **€2,915** |
| 5 - 9 April 2027 | Barcelona | Classroom | **€2,275** |
| 12 - 16 April 2027 | Frankfurt | Classroom | **€2,175** |
| 19 - 23 April 2027 | Amsterdam | Classroom | **€3,215** |
| 3 - 7 May 2027 | London | Classroom | **€2,915** |

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# Seminar dates

## Available seminar dates

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| Date | Location | Format | Fee |
|---|---|---|---|
| 10 - 14 May 2027 | Barcelona | Classroom | **€2,275** |
| 17 - 21 May 2027 | Frankfurt | Classroom | **€2,175** |
| 24 - 28 May 2027 | Cape Town | Classroom | **€1,825** |
| 14 - 18 June 2027 | London | Classroom | **€2,915** |
| 21 - 25 June 2027 | Barcelona | Classroom | **€2,275** |
| 7 - 11 June 2027 | Frankfurt | Classroom | **€2,175** |
| 19 - 23 July 2027 | London | Classroom | **€2,915** |
| 26 - 30 July 2027 | Barcelona | Classroom | **€2,275** |
| 5 - 9 July 2027 | Frankfurt | Classroom | **€2,175** |
| 12 - 16 July 2027 | Geneva | Classroom | **€3,315** |

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# Seminar dates

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| Date | Location | Format | Fee |
|---|---|---|---|
| 23 - 27 August 2027 | London | Classroom | **€2,915** |
| 2 - 6 August 2027 | Barcelona | Classroom | **€2,275** |
| 9 - 13 August 2027 | Frankfurt | Classroom | **€2,175** |
| 16 - 20 August 2027 | Istanbul | Classroom | **€2,825** |
| 13 - 17 September 2027 | London | Classroom | **€2,915** |
| 20 - 24 September 2027 | Barcelona | Classroom | **€2,275** |
| 6 - 10 September 2027 | Frankfurt | Classroom | **€2,175** |
| 11 - 15 October 2027 | London | Classroom | **€2,915** |
| 18 - 22 October 2027 | Barcelona | Classroom | **€2,275** |
| 25 - 29 October 2027 | Frankfurt | Classroom | **€2,175** |

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# Seminar dates

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| Date | Location | Format | Fee |
|---|---|---|---|
| 4 - 8 October 2027 | Madrid | Classroom | **€3,400** |
| 15 - 19 November 2027 | London | Classroom | **€2,915** |
| 22 - 26 November 2027 | Barcelona | Classroom | **€2,275** |
| 1 - 5 November 2027 | Frankfurt | Classroom | **€2,175** |
| 8 - 12 November 2027 | Munich | Classroom | **€2,425** |
| 27 - 31 December 2027 | London | Classroom | **€2,915** |
| 6 - 10 December 2027 | Barcelona | Classroom | **€2,275** |
| 13 - 17 December 2027 | Frankfurt | Classroom | **€2,175** |
| 20 - 24 December 2027 | Paris | Classroom | **€2,810** |
| 14 - 18 December 2026 | Online / Live | Online / Live | **€1,625** |

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| Date | Location | Format | Fee |
|---|---|---|---|
| 21 - 25 December 2026 | Online / Live | Online / Live | **€1,625** |
| 7 - 11 December 2026 | Online / Live | Online / Live | **€1,625** |
| 4 - 8 January 2027 | Online / Live | Online / Live | **€1,625** |
| 11 - 15 January 2027 | Online / Live | Online / Live | **€1,625** |
| 18 - 22 January 2027 | Online / Live | Online / Live | **€1,625** |
| 25 - 29 January 2027 | Online / Live | Online / Live | **€1,625** |
| 8 - 12 February 2027 | Online / Live | Online / Live | **€1,625** |
| 15 - 19 February 2027 | Online / Live | Online / Live | **€1,625** |
| 22 - 26 February 2027 | Online / Live | Online / Live | **€1,625** |
| 1 - 5 February 2027 | Online / Live | Online / Live | **€1,625** |

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| Date | Location | Format | Fee |
|---|---|---|---|
| 15 - 19 March 2027 | Online / Live | Online / Live | **€1,625** |
| 22 - 26 March 2027 | Online / Live | Online / Live | **€1,625** |
| 1 - 5 March 2027 | Online / Live | Online / Live | **€1,625** |
| 8 - 12 March 2027 | Online / Live | Online / Live | **€1,625** |
| 26 - 30 April 2027 | Online / Live | Online / Live | **€1,625** |
| 5 - 9 April 2027 | Online / Live | Online / Live | **€1,625** |
| 12 - 16 April 2027 | Online / Live | Online / Live | **€1,625** |
| 19 - 23 April 2027 | Online / Live | Online / Live | **€1,625** |
| 3 - 7 May 2027 | Online / Live | Online / Live | **€1,625** |
| 10 - 14 May 2027 | Online / Live | Online / Live | **€1,625** |

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| Date | Location | Format | Fee |
|---|---|---|---|
| 17 - 21 May 2027 | Online / Live | Online / Live | **€1,625** |
| 24 - 28 May 2027 | Online / Live | Online / Live | **€1,625** |
| 14 - 18 June 2027 | Online / Live | Online / Live | **€1,625** |
| 21 - 25 June 2027 | Online / Live | Online / Live | **€1,625** |
| 7 - 11 June 2027 | Online / Live | Online / Live | **€1,625** |
| 19 - 23 July 2027 | Online / Live | Online / Live | **€1,625** |
| 26 - 30 July 2027 | Online / Live | Online / Live | **€1,625** |
| 5 - 9 July 2027 | Online / Live | Online / Live | **€1,625** |
| 12 - 16 July 2027 | Online / Live | Online / Live | **€1,625** |
| 23 - 27 August 2027 | Online / Live | Online / Live | **€1,625** |

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| Date | Location | Format | Fee |
|---|---|---|---|
| 2 - 6 August 2027 | Online / Live | Online / Live | **€1,625** |
| 9 - 13 August 2027 | Online / Live | Online / Live | **€1,625** |
| 16 - 20 August 2027 | Online / Live | Online / Live | **€1,625** |
| 13 - 17 September 2027 | Online / Live | Online / Live | **€1,625** |
| 20 - 24 September 2027 | Online / Live | Online / Live | **€1,625** |
| 6 - 10 September 2027 | Online / Live | Online / Live | **€1,625** |
| 11 - 15 October 2027 | Online / Live | Online / Live | **€1,625** |
| 18 - 22 October 2027 | Online / Live | Online / Live | **€1,625** |
| 25 - 29 October 2027 | Online / Live | Online / Live | **€1,625** |
| 4 - 8 October 2027 | Online / Live | Online / Live | **€1,625** |

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| Date | Location | Format | Fee |
|---|---|---|---|
| 15 - 19 November 2027 | Online / Live | Online / Live | **€1,625** |
| 22 - 26 November 2027 | Online / Live | Online / Live | **€1,625** |
| 1 - 5 November 2027 | Online / Live | Online / Live | **€1,625** |
| 8 - 12 November 2027 | Online / Live | Online / Live | **€1,625** |
| 27 - 31 December 2027 | Online / Live | Online / Live | **€1,625** |
| 6 - 10 December 2027 | Online / Live | Online / Live | **€1,625** |
| 13 - 17 December 2027 | Online / Live | Online / Live | **€1,625** |
| 20 - 24 December 2027 | Online / Live | Online / Live | **€1,625** |