



### FINANCIAL ACUMEN: FINANCIAL ANALYSIS SERIES

# FP&A's Role in Business Strategy and Decision-Making

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#### COURSE LENGTH

Two 2-Hour Virtual Sessions or  
One Half-Day In Person

#### DESCRIPTION

FP&A drives business sustainability and growth. However, in order for a business to grow there must be: (1) a clear identification of the firm's values, (2) an effective governance structure, (3) a consistent process for making decisions, and (4) knowledge of the appropriate key performance indicators (KPIs) central to business success. Participants learn how to help their firms improve in these areas in order to sustain growth, with clear objectives and takeaways. Participants practice a decision-making strategy that focuses and streamlines the strategic thinking process.

#### LEARNING OBJECTIVES

- Understand the key role FP&A plays in crafting and implementing business strategy
- Understand how inefficient governance structures and poor decision-making prevent business growth
- Learn an effective model for identifying a firm's values and implementing an effective decision-making strategy
- Identify the KPIs essential to business growth

#### SAMPLE AGENDA

- Overview of Business Strategy
  - Results of ineffective strategy
  - The importance of business strategy
  - Decision-making overview
    - Acquisition decisions
    - Financing decisions
    - Asset management decisions
  - The 3 Ps: Perspective, Process & Profits
- Financial Goal of a Firm
  - Sustainably increase shareholder wealth
- Shareholder Vs. Stakeholder Theory
  - Shareholder theory
  - Streamlined stakeholder theory
- Core Moral Principles
  - Justice & non-injury
  - Fidelity & veracity
  - Reparation & beneficence
- Wealth Maximization Statement
  - Drivers of value creation
- Applying the 4 Cs
  - Customers
  - Configuration of the industry
  - Competition
  - Capabilities



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- Profits Drive Sustained Growth
  - Is your business strategy working
  - FP&A business strategy roles
- KPI Dashboard
  - Financial analytics
  - Components of profit cycle
  - Profit-centric growth strategies