

**FINANCIAL ACUMEN:**
FINANCIAL ANALYSIS SERIES

Financial Analysis I: Critical Thinking and Decision-Making

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COURSE LENGTH

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

DESCRIPTION

Finance professionals are no longer expected to only present the numbers and statements. Leadership is becoming more dependent on the finance team to provide thoughtful insights and decisions with the information it presents.

This course focuses on critical thinking skills, financial data analysis and systems thinking to improve value-added decision-making. Participants are introduced to performing value-added financial data analysis with a focus on critically analyzing data versus naive data gathering. Discussions evaluate the different methods utilized in the problem-solving process with an emphasis on situational awareness and continuous evaluation. Participants understand how to identify trends and “stories” in the data that are important for improved decision-making.

LEARNING OBJECTIVES

- Recognize trends within data to determine potential actions and conclusions
- Determine the most effective ways to present conclusions and data analysis to specific audiences
- Learn to professionally present data analysis and prepare reports that clearly communicate key messages

SAMPLE AGENDA

- Module 1: What is Critical Thinking?
 - Critical thinking virtues
- Module 2: Critical Thinking Standards
 - Elements of thought
 - Situational awareness
- Module 3: Systems Analysis
 - What is a system?
 - Systems relationships
 - Systems thinking
- Module 4: Decision Analysis
 - Decision theory

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- Module 5: Analyst Report
 - Report format
 - Submitting memorandum
 - Executive summary
- Module 6: Data Analysis
 - Define variables
 - Fundamental coding principles
 - Simple descriptive statistics
 - Scatterplots and regression
 - Moving averages and rate-of-change
- Module 7: PowerPoint Presentations
 - Listeners
 - Slide structure
 - Fonts and color
 - Graphs
- Module 8: Case Study