Advanced Executive Finance and Strategic Planning Course

31 May – 4 June 2027
Montreux

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Training Center

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Advanced Executive Finance and Strategic Planning Course

Ref: 1061_178301 **Date:** 31 May – 4 June 2027 **Location:** Montreux **Fees:** 7500 Euro

Overview

Advanced Executive Finance and Strategic Planning Course is a one-week advanced course for senior executives, finance leaders, business unit heads, strategy managers, and planning professionals, who leave with an Executive Strategic Finance Decision Pack. Participants connect executive financial analysis, strategic scenario planning, value-driver mapping, capital allocation, risk-adjusted plans, and performance governance. The course turns strategic choices into financial assumptions, priorities, measures, and decision routes. Agile Leaders Training Center develops executive finance and strategic planning capability.

Who Should Attend

- Executive teams responsible for strategic choices, resource priorities, and organizational performance
- Finance teams responsible for analysis, forecasting, investment evaluation, and management reporting
- Business unit teams responsible for plans, assumptions, budgets, and performance commitments
- Strategy teams responsible for scenario design, option evaluation, and execution tracking
- Planning teams responsible for coordinating targets, risks, resources, and decision calendars

The course assumes participants already contribute to financial or strategic decisions at work, and it leaves introductory accounting, routine budget preparation, and securities valuation outside its scope.

Departments and Industries

The course supports departments and industries that convert strategic priorities into financial choices, operating plans, and performance decisions.

- Executive management, finance, strategy, planning, and performance
- Banking, insurance, investment services, and financial technology
- Manufacturing, energy, logistics, and infrastructure
- Technology, telecommunications, professional services, and healthcare
- Risk, internal audit, transformation, and business operations

Learning Objectives

By the end of this course, participants will be able to:

- Analyze strategic position through financial and operational evidence
- Build scenario assumptions and risk-adjusted financial outlooks
- Evaluate strategic options using value and capital criteria
- Prioritize investments through a capital-allocation portfolio
- Connect strategy, budgets, forecasts, and performance measures
- Design executive decision and reporting governance

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Course Agenda

Day 1: Strategic Financial Diagnosis

- Strategic-Financial Position Diagnostic
- Business Model and Cash-Flow Logic Map
- Value-Driver Tree and Sensitivity Map
- Financial and Operational Evidence Matrix
- Executive Planning Issue Register

Day 2: Scenarios and Strategic Options

- Scenario Narrative and Assumption Book
- Driver-Based Forecasting Model
- Strategic Option Evaluation Matrix
- Risk-Opportunity Profile using COSO ERM
- Decision Threshold and Trigger Register

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Day 3: Capital Allocation and Value

- Capital-Allocation Portfolio Map
- Investment Appraisal Evidence Sheet
- Strategic Cost and Capacity Tradeoff Model
- Value-Creation and Cash-Flow Bridge
- Funding Constraint and Resource Priority Matrix

Day 4: Strategy-to-Performance Governance

- Strategy-to-Budget Alignment Bridge
- Rolling Forecast and Reallocation Calendar
- Executive Performance Measure Architecture
- Management Commentary Decision Narrative
- Decision Rights and Escalation Matrix

Day 5: Executive Strategic Finance Practice

- Exercise: Diagnose a Strategic-Financial Position
- Exercise: Stress-Test Scenario Assumptions
- Exercise: Rank a Capital-Allocation Portfolio
- Exercise: Align Strategy, Budget, and Measures
- Capstone Exercise: Executive Strategic Finance Decision Pack

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Practical Exercises

The course uses suggested activities that connect evidence, assumptions, choices, resources, risk, and performance decisions.

- Suggested activity: compare strategic-financial positions for manufacturing and technology cases
- Suggested activity: construct scenario assumptions and identify decision triggers
- Suggested activity: rank investment choices under funding and capacity constraints
- Suggested activity: prepare an executive narrative linking plans, risks, measures, and actions

FAQs

Who suits advanced executive finance and strategic planning training?

Senior executives, finance leaders, business unit heads, strategy managers, and planning professionals suit the training. The course assumes practical responsibility for analysis, plans, investments, forecasts, performance, or executive decisions.

How does executive finance and strategic planning training differ from general corporate finance training?

Executive finance and strategic planning training integrates strategic diagnosis, scenarios, option evaluation, resource allocation, risk, budgets, forecasts, measures, and governance. General corporate finance training typically concentrates more on financing, valuation, and financial techniques.

How are strategic scenarios converted into financial plans?

Strategic scenarios become financial plans through explicit drivers, assumptions, sensitivities, resource implications, risks, triggers, forecasts, and decision points. Each scenario links operational choices to cash flows, capacity, funding, and performance measures.

How should executives prioritize capital allocation?

Executives prioritize capital allocation by comparing strategic fit, value drivers, cash-flow effects, risk, timing, resource constraints, dependencies, and portfolio balance. The decision record also states assumptions, evidence, ownership, and review triggers.

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How are strategy, budgets, and performance measures kept aligned?

Strategy, budgets, and performance measures stay aligned through a common driver model, planning assumptions, resource priorities, rolling forecasts, target ownership, exception thresholds, review cycles, and documented reallocation decisions.

Conclusion

Participants take back an Executive Strategic Finance Decision Pack containing the diagnosis, value-driver map, scenario book, option matrix, capital portfolio, risk-adjusted plan, strategy-to-budget bridge, scorecard architecture, and decision-rights matrix. It makes assumptions, choices, resources, and measures traceable. Leadership teams can use it to coordinate planning and review decisions across finance, strategy, and operations.