Advanced Financial Control and Performance Evaluation Course

12 – 16 April 2027
San Diego

AGILE LEADERS
Training Center

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Ref: 1064_178523 **Date:** 12 – 16 April 2027 **Location:** San Diego **Fees:** 14000 Euro

Overview

Advanced Financial Control and Performance Evaluation Course is a one-week advanced course for financial controllers, FP&A leaders, performance managers, business finance partners, and internal control leaders, who leave with a Financial Control and Performance Pack. Participants connect financial control architecture, management control systems, responsibility accounting, performance measurement, variance analysis, rolling forecasts, KPI dashboards, control testing, and corrective-action governance. The course converts disconnected reports into traceable decisions with defined owners and evidence. Agile Leaders Training Center develops financial control and performance evaluation capability.

Who Should Attend

- Finance teams responsible for control architecture, reporting integrity, and corrective-action follow-up
- Planning teams responsible for assumptions, forecasts, scenarios, and performance narratives
- Business partners responsible for driver analysis, decision support, and accountability discussions
- Performance teams responsible for financial and nonfinancial measures, dashboards, and review cycles
- Control teams responsible for control design, testing evidence, exceptions, and remediation tracking

The course assumes participants already analyze financial or operational performance at work, and it leaves introductory accounting and jurisdiction-specific rules outside its scope.

Departments and Industries

The course supports departments and industries that need disciplined performance evaluation, forecast updates, and evidence-based control decisions.

- Finance, FP&A, management accounting, and business partnering functions
- Internal control, risk, internal audit, and governance functions
- Manufacturing, energy, logistics, and infrastructure operations
- Banking, insurance, technology, and professional services
- Healthcare, education, hospitality, and retail organizations

Learning Objectives

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

- Build a financial control architecture with accountable decision rights
- Apply responsibility accounting to performance ownership
- Analyze variances and operational performance drivers
- Evaluate financial and nonfinancial performance measures
- Use rolling forecasts to update management actions
- Prioritize control remediation through tested evidence

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Course Agenda

Day 1: Financial Control Architecture

- Financial Control Architecture Map
- Management Control System Design Canvas
- Decision Rights and Accountability Matrix
- COSO Component Alignment Map
- Control Objective and Evidence Register

Day 2: Responsibility and Measurement

- Responsibility Center Classification Model
- Controllability and Influence Assessment
- Financial and Nonfinancial Measure Tree
- KPI Definition and Ownership Card
- Performance Evaluation Scorecard

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Day 3: Variance and Driver Analysis

- Budget-to-Actual Variance Bridge
- Price, Volume and Mix Decomposition
- Operational Driver Analysis Tree
- Root-Cause Hypothesis Matrix
- Management Commentary Evidence Sheet

Day 4: Forecast and Corrective Governance

- Rolling Forecast Assumption Register
- Scenario and Sensitivity Model
- KPI Dashboard Review Protocol
- Control Testing and Exception Log
- Corrective Action Governance Tracker

Day 5: Integrated Control Practice

- Exercise: Design a Control Architecture
- Exercise: Evaluate a Responsibility Center
- Exercise: Diagnose a Variance Bridge
- Exercise: Update a Rolling Forecast
- Capstone Exercise: Financial Control and Performance Pack

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Practical Exercises

The course uses suggested activities that connect financial evidence, operating drivers, controls, forecasts, and accountable actions.

- Suggested activity: map control ownership and decision rights for manufacturing and service cases
- Suggested activity: separate price, volume, mix, and operational drivers in a variance case
- Suggested activity: test control evidence and assign corrective actions for recurring exceptions
- Suggested activity: present a forecast update with measures, assumptions, risks, and owners

FAQs

Who suits advanced financial control and performance evaluation training?

Finance, planning, performance, business-partnering, control, and audit leaders suit the training. The course assumes responsibility for reports, forecasts, measures, controls, or management decisions.

How does financial control and performance evaluation differ from general financial management training?

Financial control and performance evaluation integrates control architecture, responsibility centers, measure design, variance drivers, forecast updates, tested evidence, and corrective ownership. General financial management training usually covers broader finance decisions with less control-system depth.

How should responsibility accounting support performance evaluation?

Responsibility accounting supports evaluation by defining controllable outcomes, decision authority, measure ownership, escalation routes, and contextual drivers. The evaluation record separates accountable performance from factors outside the manager's influence.

How do rolling forecasts strengthen financial control?

Rolling forecasts strengthen financial control by updating assumptions, driver expectations, scenarios, resource implications, and corrective actions as evidence changes. Each update records the reason, owner, decision, and effect on performance measures.

How should control testing connect to KPI dashboards?

Control testing connects to KPI dashboards through evidence status, exception severity, recurring failure patterns, remediation owners, and due actions. Performance discussions can then distinguish operating results from weaknesses in the controls supporting those results.

Conclusion

Participants take back a Financial Control and Performance Pack containing the architecture map, responsibility model, measure tree, variance bridge, forecast register, control log, dashboard protocol, and corrective-action tracker. It links reported outcomes to assumptions, drivers, evidence, and owners. Finance and control teams can use it to structure performance reviews and document decisions.