



Digital Financial Modelling and Planning Automation Training Course

19 – 23 July 2027
San Diego

Digital Financial Modelling and Planning Automation Training Course

Ref: 1095_180848 **Date:** 19 – 23 July 2027 **Location:** San Diego **Fees:** 14000 Euro

Overview

Digital Financial Modelling and Planning Automation Training Course is a one-week course for FP&A leaders, financial modellers, finance transformation managers, controllers and senior analysts, who leave with a Digital Planning Model Control Pack. Participants build integrated financial planning models, create automated finance dataflows, configure scenario modelling engines and apply financial model governance to refreshable management reporting. Agile Leaders Training Center delivers digital financial modelling and planning automation training.

Who Should Attend

- Teams responsible for enterprise planning models, forecasts and scenario decisions
- Specialists responsible for model architecture, calculations and validation controls
- Managers responsible for finance dataflows, systems integration and reporting automation
- Functions responsible for controllership, model review and management assurance
- Analysts responsible for decision models, sensitivities and executive reporting

The course assumes participants already build financial models and interpret management accounts, and it leaves out bookkeeping, introductory spreadsheet skills, statutory reporting and valuation theory.

Departments and Industries

The course supports departments and industries that require controlled planning models, automated data preparation and repeatable reporting.



- Financial planning and analysis, controllership and management accounting
- Finance transformation, data operations and business intelligence
- Manufacturing, energy, construction and logistics
- Retail, healthcare, telecommunications and hospitality
- Technology, professional services, utilities and public organizations

Learning Objectives

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

- Build a modular, driver-based financial model architecture
- Apply automated data preparation and refresh controls
- Use scenario engines for planning and sensitivity decisions
- Analyze model integrity through validation and reconciliation
- Evaluate governance, access and change-control evidence
- Build refreshable management reports with traceable outputs



Course Agenda

Day 1: Digital Model Architecture

- Model Purpose and Decision-Use Map
- Input-Calculation-Output Architecture
- Driver Tree and Assumption Register
- Dimensional Planning Model Design
- ICAEW Model Clarity and Consistency Principles

Day 2: Automated Dataflows

- Source-to-Model Data Lineage Map
- Power Query Extraction and Transformation Flow
- Data Type and Exception Rule Set
- Refresh Schedule and Dependency Matrix
- Reconciliation Control and Error Log



Day 3: Integrated Planning and Scenarios

- Revenue, Cost and Capacity Driver Model
- Workforce, Capital and Cash Schedule Integration
- Base, Upside and Downside Scenario Engine
- One-Way and Two-Way Sensitivity Tables
- Rolling Planning and Version-Control Calendar

Day 4: Governance and Reporting Automation

- Model Risk and Criticality Assessment
- Access, Protection and Change-Control Matrix
- Formula Review and Structural Integrity Checklist
- Power BI Semantic Model Refresh Workflow
- Management Reporting and Variance Narrative Pack

Day 5: Digital Modelling Practice

- Exercise: Design a Controlled Model Architecture
- Exercise: Automate and Reconcile Source Data
- Exercise: Configure Drivers and Scenario Logic
- Exercise: Test Governance and Reporting Controls
- Capstone Exercise: Digital Planning Model Control Pack

Practical Exercises

The course uses suggested activities to convert finance data, assumptions and control requirements into a governed planning workflow.

- Suggested activity: map model decisions, drivers, owners, sources and dependencies
- Suggested activity: automate a dataflow and reconcile refreshed outputs to control totals
- Suggested activity: configure scenario switches, sensitivity tables and version comparisons
- Suggested activity: assemble governance evidence and refreshable management reports

FAQs

Who suits digital financial modelling training, and what does it assume?

Experienced FP&A, modelling, transformation, controllership and analysis practitioners suit the training. It assumes regular work with financial models, planning data and management accounts.

How does digital financial modelling differ from general budgeting training?

Digital financial modelling integrates model architecture, automated dataflows, scenario engines, governance and refreshable reporting, while general budgeting training typically concentrates on assumptions, submissions and periodic variance review.

What makes an integrated financial planning model reliable?

A reliable integrated model separates inputs, calculations and outputs; links schedules through controlled drivers; documents assumptions; reconciles key balances; and exposes errors, versions and changes for review.

How do automated finance dataflows improve planning models?

Automated dataflows apply repeatable extraction, transformation, validation and refresh steps, reducing manual handling while preserving lineage, exception visibility and reconciliation evidence.

Why does financial model governance matter?

Financial model governance defines ownership, access, review, change control, documentation and validation so decision makers can trace outputs and challenge model behavior.



Conclusion

Participants take back a Digital Planning Model Control Pack containing architecture maps, dataflow controls, integrated schedules, scenario logic, validation tests, governance records and reporting workflows. The pack makes model updates repeatable and reviewable. It strengthens traceability from source data and assumptions to planning decisions and management reports.