



Advanced Financial Performance Metrics and KPI Governance Training Course

19 – 23 July 2027
San Diego



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Overview

Advanced Financial Performance Metrics and KPI Governance Training Course is a one-week course for finance managers, financial analysts, FP&A professionals, controllers and business partners who leave with a governed finance KPI dictionary, performance driver tree and executive dashboard. Participants define financial performance metrics for profitability, liquidity, operating efficiency, leverage, cash conversion and value creation, then connect each measure to ownership, data lineage, targets and management action. They also use comparison bases, variance diagnosis and scenario evidence to explain what changed, why it changed and what decision follows. Agile Leaders Training Center develops practical financial performance metrics and KPI governance capability.

Who Should Attend

- Finance managers responsible for performance measurement and management reporting
- FP&A professionals responsible for targets, forecasts and variance diagnosis
- Financial analysts who calculate and interpret profitability, liquidity and leverage
- Controllers responsible for metric definitions, data quality and reporting controls
- Finance business partners who communicate performance drivers to decision makers

The course assumes participants can read financial statements and calculate common ratios. It excludes introductory accounting, general balanced-scorecard design and broad business analytics.

Departments and Industries

The course supports finance teams that need consistent measures and decision-ready performance reporting.



- Financial planning and analysis, controllership and management accounting
- Corporate finance, treasury and investor relations
- Manufacturing, logistics and consumer businesses
- Banking, insurance and professional services
- Technology, telecommunications, healthcare and infrastructure organizations

Learning Objectives

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

- Build a controlled finance KPI dictionary with calculation and ownership rules
- Interpret profitability, liquidity, efficiency, leverage and cash-flow indicators
- Construct a performance driver tree that connects operational causes to financial outcomes
- Set baselines, targets, thresholds and comparison bases for finance KPIs
- Diagnose variances and distinguish signals from calculation or data defects
- Produce an executive performance dashboard with traceable commentary and actions



Course Agenda

Day 1: Finance KPI Architecture and Governance

- Financial Performance Metrics Decision Map
- Finance KPI Dictionary and Calculation Rules
- Metric Ownership and Data-Lineage Register
- Baseline, Target and Warning Threshold Design
- KPI Review Cycle and Change Control

Day 2: Profitability and Value Drivers

- Revenue Growth and Margin Bridge
- Operating Profitability and Cost Behavior Metrics
- Return on Assets and Return on Equity Analysis
- Return on Invested Capital and Value-Creation Test
- DuPont Performance Driver Tree



Day 3: Liquidity, Efficiency and Leverage

- Liquidity and Short-Term Coverage Indicators
- Receivables, Inventory and Payables Efficiency
- Cash Conversion Cycle Driver Analysis
- Debt, Leverage and Interest Coverage Metrics
- Working-Capital Performance Diagnostic

Day 4: Targets, Variances and Executive Reporting

- Trend, Benchmark and Common-Size Comparison
- Target Setting and Tolerance-Band Logic
- Actual-to-Plan Variance Diagnosis
- Scenario and Sensitivity Indicator Testing
- Executive Performance Dashboard and Commentary

Day 5: Finance KPI Governance Practice

- Exercise: Audit a Finance KPI Definition
- Exercise: Build a Profitability Driver Tree
- Exercise: Diagnose Cash Conversion Performance
- Exercise: Set Targets and Escalation Thresholds
- Capstone Exercise: Governed Finance KPI Dictionary and Executive Dashboard

Practical Exercises

The course uses suggested activities to turn financial calculations into controlled management evidence.

- Suggested activity: reconcile competing definitions of a financial performance metric
- Suggested activity: trace a margin variance through volume, price, mix and cost drivers
- Suggested activity: diagnose a deteriorating cash conversion cycle using working-capital evidence
- Suggested activity: challenge an executive dashboard for target, threshold and commentary quality

FAQs

Who suits financial performance metrics and KPI governance training?

Finance managers, analysts, FP&A professionals, controllers and business partners suit the training. Participants should already understand financial statements and common ratios.

How does finance KPI governance differ from general KPI management?

Finance KPI governance defines formulas, accounting sources, ownership, comparison bases, targets, thresholds and review controls for measures tied to financial outcomes. General KPI management may cover broader operational or strategic measures.

Which metric families does the course cover?

The course covers profitability, returns, liquidity, working-capital efficiency, cash conversion, leverage, coverage and value-creation measures, together with the drivers that explain their movement.

Why is a performance driver tree useful?

A performance driver tree connects headline results to underlying volume, price, mix, cost, asset-use, financing and working-capital factors. It helps teams explain causes instead of reporting isolated ratios.

What belongs in an executive performance dashboard?

An executive performance dashboard contains governed definitions, current results, comparison bases, targets, thresholds, trends, driver commentary, accountable owners, actions and traceable data sources.



Conclusion

Participants take back a governed finance KPI dictionary, performance driver tree and executive dashboard containing definitions, formulas, owners, targets, thresholds, results and action commentary. The package converts disconnected ratios into a consistent view of profitability, liquidity, efficiency, leverage, cash conversion and value. Teams can use it to diagnose variances, challenge assumptions and communicate decision-ready conclusions.