



Advanced Finance Technology Strategy and Execution Course

9 – 13 May 2027
Chicago



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Overview

Advanced Finance Technology Strategy and Execution Course is a one-week course for finance managers, controllers, FP&A professionals, accountants, treasury teams, and transformation leaders who leave with a Finance Technology Execution Blueprint. Participants connect finance technology strategy, finance data governance, process automation, connected planning, digital controls, and investment governance. The course resolves fragmented tools and weak ownership through an operating-model and portfolio approach. Agile Leaders Training Center develops finance technology execution practice.

Who Should Attend

- Teams responsible for finance strategy, transformation, and operating-model design
- Teams responsible for planning, forecasting, reporting, and business partnering
- Teams responsible for accounting operations, close, and financial control
- Teams responsible for treasury processes and financial data
- Teams responsible for technology investment, delivery, and adoption

The course assumes participants already manage finance processes or decisions; it leaves out software coding, vendor certification, basic accounting, and tool-specific artificial intelligence instruction.

Departments and Industries

The course supports departments and industries that modernize finance work while preserving control and decision quality.



- Finance, accounting, treasury, and FP&A departments
- Technology, data, internal control, and transformation departments
- Manufacturing, energy, logistics, and infrastructure organizations
- Banking, insurance, and professional-service organizations
- Healthcare, retail, telecommunications, and technology organizations

Learning Objectives

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

- Analyze finance capabilities, pain points, and technology dependencies
- Build a governed finance data and systems architecture
- Prioritize automation and analytics use cases
- Apply control-by-design to digital finance processes
- Evaluate technology investments, risks, and adoption readiness
- Create a sequenced finance technology execution roadmap



Course Agenda

Day 1: Finance Technology Strategy and Architecture

- Finance Capability and Pain-Point Heat Map
- Finance Technology Operating Model Canvas
- Application and Integration Landscape Diagram
- Data-to-Decision Value Chain Map
- Technology Strategy Design Principles Register

Day 2: Data, Planning, and Analytics

- Finance Data Ownership and Governance Matrix
- Chart-of-Accounts and Master-Data Control Map
- Connected Planning Driver Model
- Self-Service Analytics Decision Catalogue
- Dashboard Definition and Data-Lineage Card



Day 3: Automation and Digital Controls

- Finance Process Mining Opportunity Map
- Automation Suitability and Exception Matrix
- Continuous Close Workflow Design
- Control-by-Design Risk and Control Register
- Human Review and Escalation Protocol

Day 4: Investment, Delivery, and Adoption

- Finance Technology Use-Case Portfolio
- Value, Risk, and Feasibility Scoring Model
- Technology Investment Business-Case Template
- Implementation Dependency and Release Roadmap
- Adoption, Skills, and Benefits Realization Plan

Day 5: Integrated Finance Technology Practice

- Exercise: Diagnose a Fragmented Finance Landscape
- Exercise: Design a Governed Data Flow
- Exercise: Select Automation and Analytics Use Cases
- Exercise: Test Controls and Investment Assumptions
- Capstone Exercise: Finance Technology Execution Blueprint



Practical Exercises

The course uses suggested activities that connect technology choices with finance outcomes in operational and service settings.

- Suggested activity: map reporting delays and data handoffs in a manufacturing finance process
- Suggested activity: score automation candidates for a shared-service close process
- Suggested activity: design data ownership and dashboard controls for a retail forecast
- Suggested activity: defend a sequenced technology portfolio using value, risk, readiness, and benefits evidence

FAQs

Who suits finance technology strategy and execution training?

Finance managers, controllers, FP&A professionals, accountants, treasury teams, and transformation leaders suit the training. Participants should already manage finance processes, information, controls, or investment decisions.

How does finance technology strategy differ from general digital transformation training?

Finance technology strategy concentrates on finance data, planning, reporting, close, controls, analytics, automation, and investment governance, while general digital transformation training spans broader enterprise change.

How should finance automation opportunities be prioritized?

Finance automation opportunities should be prioritized by process stability, volume, rule clarity, exception patterns, data quality, control risk, technical feasibility, and measurable value.

What does finance data governance require?

Finance data governance requires defined ownership, business definitions, lineage, quality rules, access controls, issue escalation, and accountability for information used in reporting and decisions.



How are finance technology investments governed?

Finance technology investments are governed through explicit use cases, value and risk criteria, dependencies, control requirements, accountable owners, adoption measures, and benefits realization reviews.

Conclusion

Participants take back a Finance Technology Execution Blueprint containing architecture views, governance matrices, use-case priorities, controls, a business case, and a delivery roadmap. The blueprint turns disconnected technology requests into governed finance choices. It helps finance, data, and technology teams agree on sequence, ownership, safeguards, and benefit evidence.