Advanced Finance Team Effectiveness and Operating Model Course

17 – 21 May 2027
Addis Ababa

AGILE LEADERS
Training Center

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Ref: 1177_224340 **Date:** 17 – 21 May 2027 **Location:** Addis Ababa **Fees:** 4500 Euro

Overview

Advanced Finance Team Effectiveness and Operating Model Course is a one-week course for finance directors, controllers, accounting leaders, planning teams, shared services, and transformation teams that need a Finance Team Effectiveness Blueprint. Participants use a six-dimension finance diagnostic to align stakeholder value, finance operating model design, finance capability development, process and control performance, data and technology enablement, and finance business partnering. Agile Leaders Training Center develops finance team effectiveness practice.

Who Should Attend

- Teams responsible for finance strategy, governance, and stakeholder value
- Teams responsible for accounting operations, controllership, and financial control
- Teams responsible for planning, analysis, performance insight, and decision support
- Teams responsible for shared services, process ownership, and service delivery
- Teams responsible for finance transformation, capability development, data, and technology

The course assumes participants can interpret finance structures, service measures, control evidence, and team capability information; it leaves out technical accounting instruction, system configuration, and employment-law advice.

Departments and Industries

The course supports departments and industries that need finance teams to combine stewardship, insight, service delivery, and collaboration.

- Finance, accounting, controllership, planning, treasury, and internal control departments
- Shared-service, transformation, data, technology, and organizational development teams
- Manufacturing, energy, transport, logistics, and construction businesses
- Banking, insurance, telecommunications, technology, and professional services
- Healthcare, education, hospitality, retail, and public-service organizations

Learning Objectives

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

- Diagnose finance-team effectiveness across six connected dimensions
- Build stakeholder value promises and a finance service portfolio
- Analyze roles, decision rights, interfaces, capabilities, and capacity
- Evaluate process, control, data, and technology performance
- Apply collaboration, leadership, and performance measures
- Prioritize improvements through governance and an implementation roadmap

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Course Agenda

Day 1: Purpose, Value, and Diagnosis

- Finance Purpose and Mandate Canvas
- Stakeholder Value and Service Expectation Map
- Six-Dimension Finance Effectiveness Scorecard
- Stewardship, Insight, and Service Balance Matrix
- Current-State Evidence and Priority Register

Day 2: Roles and Operating Model

- Finance Service Portfolio and Ownership Map
- Role, Accountability, and Decision-Rights Matrix
- Business Partner and Specialist Interface Map
- Centralized, Embedded, and Shared-Service Design Options
- Finance Operating Model Design Blueprint

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Day 3: Capability, Processes, and Controls

- Finance Capability and Proficiency Matrix
- Talent Deployment and Succession Risk Map
- End-to-End Finance Process Performance Map
- Control Ownership and Assurance Heatmap
- Capacity, Workload, and Improvement Backlog

Day 4: Data, Technology, and Performance Leadership

- Finance Data Quality and Stewardship Matrix
- Technology Enablement and Automation Opportunity Map
- Insight, Challenge, and Decision-Support Protocol
- Cross-Functional Collaboration Charter
- Finance Team Performance Dashboard and Governance Cadence

Day 5: Integrated Finance Team Practice

- Exercise: Diagnose the Six Finance Dimensions
- Exercise: Redesign Roles, Services, and Interfaces
- Exercise: Prioritize Capability, Process, and Technology Gaps
- Exercise: Define Measures, Governance, and Change Actions
- Capstone Exercise: Finance Team Effectiveness Blueprint

Practical Exercises

The course uses suggested activities that connect finance-team evidence, stakeholder expectations, operating choices, and implementation decisions.

- Suggested activity: compare stakeholder expectations with the finance service portfolio in an industrial or service organization
- Suggested activity: map decision rights and interfaces across controllership, planning, shared services, and business partnering
- Suggested activity: score capability, process, control, data, and technology gaps against agreed evidence
- Suggested activity: present a sequenced improvement roadmap with owners, measures, dependencies, and governance

FAQs

Who suits advanced finance team effectiveness training?

Finance directors, controllers, accounting leaders, planning teams, shared-service leads, and transformation teams suit the training. Participants should already interpret finance structures, service measures, control evidence, and capability information.

How does finance team effectiveness differ from technical accounting training?

Finance team effectiveness aligns purpose, services, roles, capabilities, processes, controls, data, technology, collaboration, and measures, while technical accounting training develops the application of specific accounting requirements.

What dimensions determine finance team effectiveness?

Finance team effectiveness is assessed through purpose and stakeholder value, roles and operating model, capability and talent, processes and controls, data and technology, and collaboration and performance leadership.

How can a finance operating model be evaluated?

A finance operating model can be evaluated by testing service ownership, decision rights, interfaces, location choices, capability, capacity, process outcomes, control accountability, data quality, technology enablement, stakeholder experience, and performance measures.

How should finance team improvement priorities be selected?

Finance team priorities should be selected from evidence of value gaps, operating risk, service performance, capability constraints, dependencies, effort, and expected impact, then assigned owners, measures, governance, and a sequenced roadmap.

Conclusion

Participants take back a Finance Team Effectiveness Blueprint containing a six-dimension scorecard, stakeholder value map, operating model, capability matrix, process-control heatmap, data-technology roadmap, collaboration charter, measures, governance, and implementation roadmap. The blueprint makes team-design choices traceable. It also aligns finance leaders around priorities, ownership, and evidence.