

EVALUATING FINANCIAL PERFORMANCE USING KEY PERFORMANCE INDICATORS (KPIs)

"Mastering Financial Insight and Strategic Decision-Making Through KPI Analysis"

Schedule

Date	Venue	Fees (Face-to-Face)
06 - 10 Jul 2026	Dubai, UAE	USD 3495 per delegate

► **Available delivery methods:** Face-to-Face & Online Training

Introduction

In a data-driven world, financial professionals must go beyond traditional reports and embrace performance-based evaluation to guide decisions. Key Performance Indicators (KPIs) offer a clear lens into a company's financial health, operational effectiveness, and strategic alignment.

This course empowers participants to understand, select, and interpret the most relevant financial KPIs to assess organizational performance. Through interactive exercises, financial analysis tools, and real-world case studies, professionals will develop the ability to translate financial metrics into meaningful business insights that support sustainable growth and stakeholder confidence.

Objectives

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

- Identify and apply relevant financial KPIs across various business functions
- Analyze financial statements to assess profitability, efficiency, liquidity, and solvency
- Develop and use dashboards for KPI tracking and reporting
- Interpret KPI trends and variances for strategic decision-making
- Link financial KPIs to organizational goals and performance improvement plans

Why Attend

- Gain hands-on experience with financial analysis and KPI evaluation
- Bridge the gap between financial data and executive decisions
- Improve financial transparency and accountability within your organization
- Support budgeting, forecasting, and performance management initiatives
- Develop custom KPI sets aligned with business strategy and stakeholder needs

Target Audience

This program is designed for:

- Finance and accounting professionals
- Controllers, financial analysts, and auditors
- Business managers responsible for performance reporting
- Budgeting and planning staff
- Executives seeking a deeper understanding of financial health indicators

Individual Benefits

Key competencies that will be developed include:

- Selection and interpretation of meaningful financial KPIs
- Advanced financial statement analysis
- Use of KPI dashboards and performance reports
- Linking operational activities to financial outcomes
- Presenting financial performance data to stakeholders effectively

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Improved financial control and resource allocation
- Stronger alignment of metrics with business strategy
- Enhanced performance monitoring and variance management
- More insightful and actionable financial reporting
- Better stakeholder confidence through transparent performance metrics

Instructional Methodology

The course follows a blended learning approach combining theory with practice:

- Strategy Briefings – Overview of financial performance frameworks and KPI systems
- Case Studies – Corporate scenarios and industry benchmarking
- Workshops – KPI identification, ratio analysis, and dashboard building
- Peer Exchange – Group evaluation of financial data and trends
- Tools – Excel models, KPI scorecards, and financial reporting templates

Course Outline

Training Hours: 7:30 AM - 3:30 PM Daily Format: 3-4 Learning Modules | Coffee breaks: 09:30 & 11:15 | Lunch Buffet: 01:00 - 02:00

Day 1: Financial Fundamentals and KPI Framework

- Module 1: Understanding Financial Statements (07:30 - 09:30) • Income statement, balance sheet, and cash flow statement basics
- Module 2: Financial Performance and KPI Categories (09:45 - 11:15) • Profitability, liquidity, efficiency, and solvency metrics
- Module 3: Selecting the Right KPIs for Your Business (11:30 - 01:00) • Industry benchmarks and stakeholder-focused metrics
- Module 4: Workshop - Build a Basic KPI Dashboard (02:00 - 03:30) • Use Excel to design a performance tracking tool

Day 2: Profitability and Efficiency Analysis

- Module 1: Profit Margins and Return Metrics (07:30 - 09:30) • Gross margin, operating margin, ROI, ROE
- Module 2: Cost Management and Operating Leverage (09:45 - 11:15) • Fixed vs. variable cost impact on KPIs
- Module 3: Asset Efficiency and Turnover Ratios (11:30 - 01:00) • Inventory, receivables, and asset turnover
- Module 4: Workshop - Profitability and Efficiency Case Study (02:00 - 03:30) • Analyze a sample company and compare KPIs

Day 3: Liquidity, Solvency, and Financial Health

- Module 1: Liquidity Indicators and Working Capital (07:30 - 09:30) • Current ratio, quick ratio, cash conversion cycle
- Module 2: Debt Ratios and Solvency Measures (09:45 - 11:15) • Leverage ratios, interest coverage, debt-to-equity
- Module 3: Interpreting Financial Health Trends (11:30 - 01:00) • Detecting warning signs and improvement opportunities
- Module 4: Workshop - Financial Health Dashboard Design (02:00 - 03:30) • Build and interpret a financial risk monitoring tool

Day 4: Strategic KPI Alignment and Decision Support

- Module 1: Linking KPIs to Strategic Objectives (07:30 - 09:30) • Balanced Scorecard and strategic maps
- Module 2: Forecasting and Target Setting (09:45 - 11:15) • Trend analysis, rolling forecasts, variance targets
- Module 3: Scenario Analysis and What-If Modeling (11:30 - 01:00) • Financial simulation tools and drivers
- Module 4: Workshop - KPI Alignment Exercise (02:00 - 03:30) • Map KPI performance to business strategy

Day 5: Reporting and Communicating Financial KPIs

- Module 1: Designing Performance Reports and Dashboards (07:30 - 09:30) • Report formatting, visualization, automation
- Module 2: Communicating KPIs to Stakeholders (09:45 - 11:15) • Executive, board, and departmental reporting techniques
- Module 3: Final Case Study - KPI Review and Recommendations (11:30 - 01:00) • Analyze and improve an underperforming business unit
- Module 4: Wrap-Up and Certification (02:00 - 03:30) • Participant presentations and certificate awarding

Certification

Participants will receive a Certificate of Completion in Evaluating Financial Performance Using Key Performance Indicators (KPIs), confirming their ability to interpret financial data and drive decisions through performance measurement.

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TEL:

+601116373203

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info@mawaevents.net

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