

FINANCIAL PLANNING & ANALYSIS (FP&A) - TECHNICAL AND STRATEGIC MASTERY

“Transforming Financial Insights into Strategic Business Value”

Schedule

Date	Venue	Fees (Face-to-Face)
04 – 08 May 2026	Dubai, UAE	USD 3495 per delegate

Introduction

In today’s dynamic business landscape, the role of Financial Planning & Analysis (FP&A) professionals is expanding from number crunching to strategic advisory. Organizations require accurate forecasting, insightful financial modeling, and agile scenario planning to navigate complexity and drive performance.

This 5-day intensive course provides both technical and strategic FP&A mastery. Participants will gain hands-on experience with advanced Excel-based modeling, budgeting, and variance analysis, while also exploring stakeholder communication, business partnering, and alignment of financial insights with organizational goals.

Objectives

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

- Build dynamic financial models and scenario plans using Excel
- Develop rolling forecasts and driver-based budgets
- Interpret and communicate variance and trend analysis
- Link FP&A insights with strategic business objectives
- Support executive decision-making with actionable analytics

Why Attend

- Strengthen technical FP&A competencies using practical tools and templates
- Learn how to present financial data effectively to non-financial stakeholders
- Improve planning accuracy and responsiveness in volatile conditions
- Align your role as an FP&A professional with strategic leadership
- Benchmark your organization's planning process against best practices

Target Audience

This program is designed for:

- FP&A professionals and financial analysts
- Finance managers, controllers, and planning heads
- Business partners and commercial finance teams
- Budgeting and forecasting specialists
- Anyone involved in financial modeling or decision support

Individual Benefits

Key competencies that will be developed include:

- Building and auditing Excel-based financial models
- Rolling forecast and zero-based budgeting techniques
- KPI selection and dashboard reporting
- Sensitivity and scenario analysis
- Financial storytelling and strategic alignment

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Stronger alignment between financial plans and strategic goals
- Enhanced decision support for executive teams
- Reduced planning cycles and improved forecast accuracy
- Better cash flow management and capital allocation
- Greater agility in responding to market shifts and risks

Instructional Methodology

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

- Strategy Briefings - FP&A frameworks, value drivers, and forecasting models
- Case Studies - Business performance challenges and decision analysis
- Workshops - Hands-on model building, variance reviews, and forecasting exercises
- Peer Exchange - Sharing FP&A reporting practices and tools
- Tools - Excel models, planning templates, and executive reporting formats

Course Outline

Training Hours: 07:30 AM - 03:30 PM Daily Format: 3-4 Learning Modules | Coffee Breaks: 09:30 & 11:15 | Lunch Break: 01:00 - 02:00

Day 1: Foundations of FP&A and Financial Modeling

- Module 1: The Role of FP&A in Strategic Decision Support (07:30 - 09:30) • Evolution, responsibilities, and key deliverables
- Module 2: Excel Modeling Essentials and Best Practices (09:45 - 11:15) • Structuring, auditing, and version control
- Module 3: Workshop - Build a Revenue Forecast Model (11:30 - 01:00) • Formula logic, drivers, and assumptions

Day 2: Forecasting and Budgeting Techniques

- Module 4: Rolling Forecasts and Predictive Analytics (07:30 - 09:30) • Drivers, time horizons, and data integration
- Module 5: Budgeting Approaches - Traditional vs Agile (09:45 - 11:15) • Zero-based, driver-based, and activity-based budgeting
- Module 6: Workshop - Create a Rolling Forecast Template (11:30 - 01:00) • Dynamic linking and scenario toggling

Day 3: Variance Analysis and Business Partnering

- Module 7: Variance Interpretation and Root Cause Analysis (07:30 - 09:30) • Price-volume-mix and waterfall charts
- Module 8: Financial Communication and Storytelling (09:45 - 11:15) • Stakeholder messaging and visualization
- Module 9: Workshop - Build a Monthly Variance Dashboard (11:30 - 01:00) • Charts, commentary, and trend insights

Day 4: Scenario Planning and Strategic Linkage

- Module 10: Sensitivity and What-if Analysis (07:30 - 09:30) • Stress testing and assumption switching
- Module 11: Linking Financial Models to Strategy (09:45 - 11:15) • KPIs, strategic initiatives, and long-term value
- Module 12: Workshop - Strategic Scenario Simulation (11:30 - 01:00) • Market changes, cost shocks, and capital planning

Day 5: Final Integration and FP&A Impact

- Module 13: Advanced Dashboarding and Automation (07:30 - 09:30) • Excel Power Query and pivot integration
- Module 14: Final Project - FP&A Improvement Plan (09:45 - 01:00) • Build a plan to improve your own FP&A process

Certification

Participants will receive a Certificate of Completion in Financial Planning & Analysis (FP&A) - Technical and Strategic Mastery, confirming their ability to apply modern FP&A tools, models, and insights to support high-impact financial decision-making.

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