XCELERATE TRAINING INSTITUTE
your learning & development partner

ACCOUNTING & FINANCE

# Financial Strategy Training Course

| DURATION | LANGUAGE | FORMAT |
|---|---|---|
| 5 days | English | Classroom / Online |

## Upcoming dates

| Dates | Venue | Format | Fee |
|---|---|---|---|
| 8 – 12 Feb 2027 | Live online | Online (live) | €1,200 |
| 15 – 19 Mar 2027 | Bahrain | Classroom | €5,500 |
| 16 – 20 Aug 2027 | Live online | Online (live) | €1,200 |

### Register or ask a question

Online: x8ti.com/course/financial-strategy-training-course/
+491631686678 · info@x8ti.com

# Financial Strategy Training Course

## Introduction

Creating a financial strategy involves developing guidelines to achieve future goals. Similar to navigating a busy street blindfolded, without a strategy, even the most resourceful management can struggle to steer the business effectively. Strategy provides a framework that guides choices and actions, ensuring that the business moves in the right direction. In finance, a strategic approach helps in making decisions related to resource allocation, capital structure, growth, and financial stability.

## Learning Objectives

Upon completing the Financial Strategy course, participants will:

- Understand the need for strategic financial management.
- Evaluate the financial performance of projects based on business standards.
- Make sound financial decisions in a dynamic business environment.
- Develop financial strategies aligned with long-term organizational goals.
- Make accurate financial projections and forecasts.
- Assess financial risks associated with projects.
- Balance the interests of various stakeholders and add value to the business.

## Training Methodology

This course includes:

- Interactive lecture sessions
- Practical problem-solving
- Case studies
- Management games
- Presentations
- Group discussions Xcelerate Training Institute uses the ‘Do-Review-Learn-Apply’ model for effective learning.

## Benefits for Your Organisation

Organizations will benefit from:

- Making informed decisions about fund allocation.
- Anticipating and countering competitor moves.
- Adopting cost-effective financial policies.
- Timely forecasting of fund requirements for adequate supply.
- Aligning financial objectives with organizational goals.
- Efficiently managing working capital and financing current assets.
- Developing a robust financial recording and accounting system.
- Coordinating finance functions with other departments.

## Benefits for You

Participants will gain:

- Knowledge of finance functions and strategy.
- Understanding of how finance strategy integrates with corporate strategy.
- Preparation for future challenges.
- Tools and techniques for financial projections and forecasting.
- Practical application of theoretical knowledge.
- A competitive edge with enhanced financial strategic management skills.

## Who Should Attend

This course is suitable for:

- New entrepreneurs and start-up founders
- Finance managers
- Corporate managers
- Financial analysts and budget analysts
- Investors
- Departmental heads and executives
- Accountants
- Cost estimators and controllers

## Course Outline

### Introduction to Concepts of Strategy and Strategic Management

- Strategic Intent
- Strategy Formulation
- Corporate Level Strategy: Expansion Strategies, Retrenchment
- Business Level Strategy: Cost Leadership, Differentiation Strategy
- Finance Strategic Management
- Strategic Cost Management

### Finance Functions

- Investment Decision: Capital Budgeting
- Financing Decision: Capital Structure, Debt-Equity Mix, Operating and Financial Leverage
- Dividend Decision

### Financial Forecasting

- Forecasting Financial Statement Techniques
- Projection of Balance Sheet, Cash Flow
- Day Sales Method, Percentage of Sales Method, Simple Linear Regression Method
- Internal Growth Rate, Sustainable Growth Rate

## Financial Planning

- Types of Financial Plans
- Process of Financial Planning
- Budget Preparation

## Risk Evaluation and Management

- Business Risk, Financial Risk
- Elements of Risk: Systematic and Unsystematic Risk
- Profitability Analysis
- Projected Beta
- Mean-Variance Analysis: Standard Deviation and Coefficient of Variation

## Working Capital Management

- Working Capital Policies: Levels of Working Capital Investment
- Profitability vs. Risk Trade-Off: Conservative, Matching, Aggressive Approach to Asset Financing
- Managing Liquidity and Financial Flexibility
- Short-Term Financing: Factoring, Bill Discounting

## Business Restructuring

- Corporate Restructuring: Mergers and Acquisitions
- Financial Restructuring: Debt Restructuring, Equity Restructuring
- Re-Organization of Shares
- Buy-Back of Shares
- Trading on Equity

## Business Valuation

- Shareholder Value Analysis
- Business Valuation Methods: Discounted Cash Flows, Comparable Market Multiples Method
- Economic Value-Added Approach
- Business Model Analysis

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# Registration Form

## Financial Strategy Training Course

Preferred dates: ..... Venue or online: .....

Duration: 5 days Language: .....

Please complete and email this form to us, or register online. We confirm your place and send the invoice within one working day.

### Delegate information

Full name (Mr / Ms / Dr / Eng): .....

Position: ..... Telephone / mobile: .....

Official email: ..... Personal email: .....

### Company information

Company name: .....

Address: .....

City / country: ..... VAT / tax number: .....

### Person responsible for training & development

Full name (Mr / Ms / Dr / Eng): .....

Position: ..... Telephone / mobile: .....

Email: .....

### Payment

☐ Please invoice me ☐ Please invoice my company

Signature: ..... Date: .....

**Call**
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**Email this form**
info@x8ti.com

**Register online**
Open the course page