FINANCIAL ANALYSIS, PLANNING & CONTROL



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TRAINING CENTER

GENTEX Training Center LLC | Orlando - FL, USA
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Introduction

Financial Analysis, Planning & Control Training Course builds the integrated financial management capability that analysts, controllers, and finance managers need to analyse performance, plan forward, and control outcomes. These three activities form one cycle. Analysis identifies where performance stands, planning decides where it should go, and control keeps it on course. Organisations that run them separately get plans without evidence and controls without direction. This course develops the cycle as one connected discipline. It covers financial statement analysis, ratio and cash flow review. Furthermore, it applies budgeting, forecasting, and cost control. In addition, it develops variance analysis, performance measurement, and management reporting. As a result, participants run the full financial management cycle with confidence.

Financial Analysis, Planning & Control Course Objectives

- Interpret financial statements using structured analytical techniques.
- Apply ratio, trend, and cash flow analysis to performance review.
- Build budgets using incremental, zero-based, and activity-based methods.
- Apply driver-based forecasting and rolling forecast routines.
- Apply cost control and cost behaviour analysis techniques.
- Apply standard costing and variance analysis methods.
- Apply flexible budgeting and budget revision procedures.
- Design KPI frameworks and performance scorecards.
- Apply internal control and financial control principles.
- Prepare management reporting packs and control dashboards.

Course Methodology

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- Interactive lectures with real analysis, planning, and control cases.
- Statement analysis and ratio technique workshops.
- Budgeting, forecasting, and costing exercises.
- Variance analysis, KPI, and reporting practice.
- Structured peer review with facilitator feedback on financial plans.

Who Should Take This Course

- Financial analysts and management accountants.
- Budgeting and planning managers.
- Financial controllers and reporting managers.
- Business unit finance partners.
- Cost controllers and performance analysts.
- Consultants advising on financial management.

Financial Analysis, Planning & Control Course Outlines

Day 1: Financial Analysis Foundations

- Financial statement structure and interpretation.
- Profitability, liquidity, efficiency, and gearing ratio analysis.
- Trend, common-size, and peer benchmarking techniques.
- Cash flow analysis and free cash flow derivation.
- Earnings quality and accruals assessment.
- Working capital and cash conversion cycle review.
- Case study: conducting a full financial performance review.

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Day 2: Budgeting and Financial Planning

- Planning cycle and budget calendar design.
- Incremental, zero-based, and activity-based budgeting.
- Revenue, cost, cash, and capital budget components.
- Budget assumptions and documentation standards.
- Rolling forecasts and continuous planning.
- Budget approval and communication routines.
- Workshop: preparing a departmental and consolidated budget.

Day 3: Cost Control and Standard Costing

- Cost classification and cost behaviour modelling.
- Cost centre and responsibility accounting design.
- Standard costing and standard setting.
- Material, labour, and overhead variance calculation.
- Activity-based costing and cost driver analysis.
- Cost reduction and efficiency programmes.
- Workshop: calculating and interpreting cost variances.

Day 4: Variance Analysis and Performance Control

- Flexible budgets and volume-adjusted comparison.
- Price, volume, efficiency, and mix variance decomposition.
- Variance investigation and exception reporting.
- KPI design and performance scorecard development.
- Balanced scorecard and value driver linkage.

- Corrective action planning and accountability.
- Workshop: preparing a variance and performance report.

Day 5: Financial Control and Management Reporting

- Internal control principles for financial processes.
- Segregation of duties and authorisation frameworks.
- Reconciliation, close, and control account discipline.
- Management reporting pack design and dashboards.
- Board and executive financial reporting practice.
- Forecasting accuracy tracking and continuous improvement.
- Course review, assessment, and action planning.

Conclusion

By successfully completing Financial Analysis, Planning & Control, participants will gain a thorough understanding of financial analysis foundations, budgeting and financial planning, cost control and standard costing, variance analysis and performance control, and financial control and management reporting. They will also acquire practical skills in financial statement analysis and ratio techniques, budgeting, forecasting and financial planning, cost control, standard costing and variance analysis, and financial control, KPI design and management reporting. In addition, the course prepares them to run analysis, planning, and control as one connected management cycle. Gentex Training Center delivers this programme with a strong focus on applied financial management and decision-ready reporting.

FAQs for Financial Analysis, Planning & Control course

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Q1 What is the "Financial Analysis, Planning & Control" course about?

It is a five-day programme on the connected financial management cycle. It covers financial analysis foundations, budgeting and planning, cost control and standard costing, variance analysis and performance control, and financial control and management reporting.

Q2 What are the key benefits of the "Financial Analysis, Planning & Control" course?

Participants run analysis, planning, and control as one cycle rather than separate tasks. The course improves statement and ratio analysis, sharpens budgeting and forecast construction, strengthens standard costing and variance work, improves KPI and scorecard design, and raises financial control and reporting quality.

Q3 What skills will I gain from the "Financial Analysis, Planning & Control" course?

Participants gain financial statement analysis and ratio techniques, budgeting, forecasting and financial planning, cost control, standard costing and variance analysis, and financial control, KPI design and management reporting. These four skills cover the practical core of the financial management cycle.

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Q4 What tools, methods, or standards are covered in the "Financial Analysis, Planning & Control" course?

The course covers financial statement structure and interpretation, profitability, liquidity, efficiency and gearing ratio analysis, trend, common-size and peer benchmarking, free cash flow derivation, earnings quality and accruals assessment, working capital and cash conversion cycle analysis, planning cycle and budget calendar design, incremental, zero-based and activity-based budgeting, revenue, cost, cash and capital budget components, budget assumptions and documentation, rolling forecasts and continuous planning, cost classification and cost behaviour modelling, cost centre and responsibility accounting, standard costing and standard setting, material, labour and overhead variance calculation, activity-based costing and cost driver analysis, flexible budgets and volume-adjusted comparison, price, volume, efficiency and mix variance decomposition, variance investigation and exception reporting, KPI design and performance scorecards, balanced scorecard and value driver linkage, internal control principles for financial processes, segregation of duties and authorisation frameworks, reconciliation, close and control account discipline, management reporting pack design, and board reporting practice.

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Q5 How is the "Financial Analysis, Planning & Control" course applied in real-world practice?

Participants apply the methods to real financial management tasks. They analyse statements and calculate ratios, run trend, common-size and peer comparisons, derive free cash flow, review earnings quality and working capital, prepare departmental and consolidated budgets, document budget assumptions, build rolling forecasts, classify costs and model cost behaviour, set standards and calculate variances, apply activity-based costing, prepare flexible budgets, decompose price, volume, efficiency and mix variances, investigate exceptions, design KPIs and scorecards, apply segregation of duties and authorisation controls, and prepare management reporting packs and dashboards. Many leave with a financial analysis template, a budgeting and forecasting model, and a variance and reporting pack structure ready to use.