Corporate Financial Planning, Budgeting & Control Self-Study Webinar (8 Hours)

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Self Study Webcast
Dec 20 - Dec 21
Overview:
To survive and thrive in the current ever-changing, hyper-competitive global marketplace, financial managers must go far beyond traditional business concepts. Today they must understand the new dynamics and inter-relationship of forecasting, budgeting, and business performance that will determine their organization’s future success or failure. In this leading edge self-study webinar, you will learn how to:

- Develop effective goals, strategies and plans that lead to successful business objectives
- Leverage the latest technologies and business practices such as data analytics, artificial intelligence, robotics, etc. to support critical business decisions
- Use intelligent forecasting techniques and generative AI to greatly improve the financial planning and budgeting process

Objective:
To show financial managers how to develop meaningful goals, create strategic plans and set business objectives that lead to a dynamic new budgeting process that generates outstanding results.

SPEAKERS:

David Levi, Senior Vice President, Controller & Principal Accounting Officer, Vonage

Andrés Jalfen, Vice President of Finance, Assistant Controller—Strategy & Budgets, IBM

Brian Mace, Managing Director, Finance Transformation, KPMG
Detailed Learning Objectives [1]

Emphasis:

- **Corporate Planning & Budgeting**
  – Financial Planning and Analysis (FP&A) overview
    – Reporting
    – Planning
    – Analytics
    – Business partnerships
  – Financial planning process walkthrough
  – Techniques to drive agility in the planning process
    – Rolling forecasts vs. annual budgets
    – Scenario planning
  – Embracing analytics in the planning process
    – Data analytics
    – Business analytics
    – Applying analytics
    – Budgeting

- **IBM's Best Practices for Corporate Financial Planning & Budgeting**
  – Finance organization
  – Business model
    – Shareholder expectations
    – External value
    – Internal value
    – Mid-term model and revenue growth
    – Portfolio mix driving margin expansion and cash flow growth
  – Planning cycles: budget and forecast
    – Strategy cycle
    – Execution cycle
    – Budget
    – Forecasting process overview
  – Adoption of AI
    – Continuing finance transformation journey
    – Optimizing workflow
    – Applying analytics and leveraging new technologies across finance and operations
    – Enterprise performance management
    – Utilizing GenAI support
- **Intelligent Forecasting Methods & Uses of Generative AI in Corporate Planning**
  – Market trends for FP&A
    – Enterprise data ecosystem
    – Automation and adoption
    – Concerns regarding AI adoption
    – Machine Learning (ML)
    – Deep Learning (DL)
    – Opportunities for AI and ML in finance
  – Intelligent forecasting
    – Applying predictive modeling
    – Financial planning vs. operational planning
    – Industry applications
    – Intelligent forecasting case study
    – Getting started
  – Generative AI for Finance
    – Accessibility
    – Key concepts
    – Finance use cases
    – Example for creating summaries and insights of financial forecasts
    – Use cases for IR and market intelligence teams
    – Analyze investor communications
    – Key capabilities and benefits
    – Dashboard use

- Identify planning activities within FP&A
- Recognize the purpose of FP&A
- Recognize the primary functions of analytics section of FP&A
- Identify examples of reporting
- Recognize the responsibilities of Corporate FP&A
- Recognize an example of a collaborative deliverable between departments in an organization
- Identify the steps of integrated business planning
- Identify the characteristics of rolling forecasts

• Recognize the number of steps in scenario planning

• Identify the definition of data analytics

• Identify the steps in the data analytics process

• Identify the functions of the corporate finance headquarters at IBM

• Identify the AI and data platform used by IBM

• Identify the forms returns to shareholders can take

• Recognize what high single digit profit growth is driven by

• Identify the processes that are in the execution cycle of IBM's planning cycle

• Identify ways IBM leverages generative AI

• Recognize the features of an empowered workforce that utilizes an enterprise data ecosystem

• Recognize the percentage of CEOs that have an aggressive investment strategy

• Identify barriers in Generative AI implementation

• Identify the definition of Artificial Intelligence

• Recognize examples of Machine Learning

• Recognize how many main components make up intelligent forecasting

• Identify examples of how predictive modeling is being applied

• Recognize common examples of intelligent forecasting within the industrial manufacturing and financial services industries

• Recognize the definition of Generative AI

Bottom**Prerequisite:**
None.

Preparation:
No advance preparation required.

Level of Knowledge:
Overview.

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