

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

SA05724A  
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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

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Recognize the function of cash in corporate planning

Identify the definition of debt capital

Identify the impact of the debt capital structure

Identify the function of the corporate financial management of cash

Identify the role of cash capital in the company

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**BottomPrerequisite:**  
None.

**Preparation:**  
No advance preparation required.

**Level of Knowledge:**  
Overview.

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