

## Financial Analysis and Business Performance Management

This intensive **2-Day** hands-on workshop covers the following practice areas and topics:

- Financial Analysis
- Business Performance Management
- Measuring and Driving What's Important
- Improving the Operating Plan and Budgeting Process
- Driving Performance and Value

### Workshop Content Outline

#### I. Introduction

#### II. Financial Analysis:

- Key Financial Ratios
- Economic Profit and Return on Invested Capital ("ROIC")
- Return Trees
- Valuation Metrics and Value Drivers
- Messaging: Communicating Financial Results
- The Business Model
- Analyzing Business Proposals
- Sensitivity and Scenario Analysis

#### III. Corporate (Business) Performance Management:

- CPM<sup>3</sup>: A comprehensive Framework for Corporate Performance Management
- Connecting the dots between Operating Activities, Financial Performance and Value Creation
- Key Performance Measures
- Creating Effective Performance Dashboards for performance and value
- CSF and Common Mistakes
- Focus on Improving Business Performance
- Integrating BPM into Key Management Processes

#### IV. Perspective Shift: Measuring and Driving What's Important

- Value Creation
- Innovation
- Agility
- Execution
- Human Capital

#### V. Improving the Operating Plan and Budget Process

- 10 Best Practices
- Continuous Business Outlook

#### VI. Driving Performance and Value

- Assessing Business Performance: Benchmarking, Process Evaluation and Private Equity Practices
- Eliminating Financial Illiteracy
- Driving Performance in Tough Times
- Five actions to accelerate improvements and value creation

#### VII. Summary

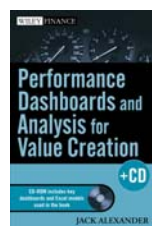
#### Who should attend?

CFO's, Controllers, Treasurers, Investor Relations professionals, financial analysts and others interested in Financial Analysis and business performance management.

#### About the Discussion leader

Jack Alexander, a CFO turned consultant, educator and author is the discussion leader for the workshop. Jack is the author of "Performance Dashboards and Analysis for Value Creation" published by Wiley in 2006. He is a senior lecturer at Babson College, where he has taught Corporate Finance and Advanced Finance electives in the MBA program covering valuation and capital investments and Private Equity and M&A transactions. He is a frequent speaker on value creation and business performance management and is President of Jack Alexander and Associates, LLC.

Free Copy of "Performance Dashboards and Analysis for Value Creation" to all program attendees, a \$70.00 value.



Includes a CD Rom with dozens of excel models and dashboards

*"Beyond academic theory, I have witnessed firsthand Alexander's framework-driven concepts improve firm profitability and value..."*

-William W. Benton, CFA, Investment Analyst, William Blair & Company, LLC

Typical individual cost for this workshop is \$1,295. If you would like to be notified when this seminar is scheduled for a city near you, or if you are interested in us conducting an in-house session for your staff, please let us know at one of the following:

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