AMERICAN GLOBAL INSTITUTE FOR PRIVATE TRAINING

External Training Course

Advanced Budgeting and Financial Statement Analysis

From 29 Sep. To 03 Oct. 2025
From 20 Oct. To 24 Oct. 2025
From 17 Nov. To 21 Nov. 2025
From 15 Dec. To 19 Dec. 2025

France, Paris

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External Training Course:

Advanced Budgeting and Financial Statement Analysis

From 29 Sep. To 03 Oct. 2025	**Fees: 1950 KD**
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Course Overview

This advanced program provides in-depth knowledge and practical skills in budgeting, forecasting, and financial statement analysis. It empowers professionals to interpret complex financial data, design effective budgets, and make strategic decisions that drive organizational performance. The course integrates analytical tools, performance indicators, and scenario-based budgeting to enhance financial planning and control in dynamic business environments.

Course Objectives

By the end of this course, participants will be able to:

- Develop and implement advanced budgeting systems aligned with strategic goals.
- Analyze financial statements to assess profitability, liquidity, and solvency.
- Apply ratio analysis, trend analysis, and benchmarking techniques.
- Prepare rolling forecasts and flexible budgets for uncertain environments.
- Evaluate variances and apply corrective measures for performance improvement.
- Link budgets with key performance indicators (KPIs) and strategic targets.
- Utilize financial modeling tools for scenario and sensitivity analysis.
- Communicate financial insights effectively to management and stakeholders.

Target Audience

This course is designed for:

- Financial Managers, Controllers, and Accountants.
- Budgeting and Planning Officers.
- Finance and Business Analysts.
- Department Heads and Decision Makers.
- Professionals involved in corporate planning, cost control, or performance management
- Anyone seeking to enhance financial interpretation and planning capabilities.

Training Methodology

Interactive lectures and group discussions.

Hands-on exercises using real-world financial data.

Case studies from leading global organizations.

Budgeting simulations and performance dashboards.

Problem-solving workshops and financial modeling.

Pre- and post-assessment to measure learning progress.

Organizational Impact

Upon completion, organizations will benefit through:

- Improved budgeting accuracy and cost control.
- Stronger financial planning aligned with strategy.
- Enhanced decision-making through data-driven insights.
- Better financial performance measurement and accountability.
- Increased efficiency in resource allocation.
- Greater transparency and risk awareness in financial management.

Personal Impact

Participants will gain:

- Mastery in analyzing and interpreting complex financial statements.
- Confidence in presenting financial insights to executives.
- Advanced skills in budgeting, forecasting, and variance analysis.
- A strategic mindset toward finance-driven decision-making.
- Tools and templates for real-world budgeting and reporting.
- Enhanced career prospects in financial leadership roles.

Course Content & Outline

Day 1 – Strategic Role of Budgeting & Financial Planning

- The purpose and evolution of budgeting in modern organizations.
- Linking strategic objectives with operational budgets.
- Types of budgets: incremental, zero-based, activity-based, and rolling.
- Budget frameworks and cycle management.
- Key elements of a master budget.
- Coordination between departments in budget formulation.
- Common pitfalls and how to avoid them.

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Day 2 – Advanced Budgeting Techniques & Forecasting

- Forecasting methodologies: qualitative vs quantitative.
- Regression analysis and trend projection.
- Developing flexible and rolling budgets.
- Scenario planning and "what-if" analysis.
- Integrating budgets with KPIs and scorecards.
- Forecasting under uncertainty and volatility.
- Practical workshop: Preparing a rolling forecast model.

Day 3 – Financial Statement Analysis: Tools & Techniques

- Overview of financial statements: Income Statement, Balance Sheet, Cash Flow.
- Analytical tools: horizontal, vertical, and ratio analysis.
- Assessing liquidity, profitability, solvency, and efficiency ratios.
- Trend and comparative analysis across periods.
- Using common-size statements for benchmarking.
- Financial performance interpretation for strategic decisions.
- Case study: Real-world company financial analysis.

Day 4 – Variance Analysis & Performance Evaluation

- Budget vs. actual performance: identifying and analyzing variances.
- Types of variances: sales, cost, volume, and efficiency.
- Root cause analysis and corrective actions.
- Linking variance results to performance rewards and accountability.
- Building dashboards for performance tracking.
- Integrating variance analysis into continuous improvement systems.
- Group exercise: Variance and KPI analysis simulation.

Day 5 – Integrating Financial Analysis with Strategic Decision-Making

- Using financial analysis to support investment decisions.
- Linking budgeting and performance to corporate strategy.
- Capital budgeting fundamentals: NPV, IRR, and payback methods.
- Risk analysis and sensitivity testing.
- Communicating results to senior management and stakeholders.
- Building integrated financial planning systems.
- Course wrap-up, group presentations, and action planning.

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Course Agenda:

(1st Day) Agenda

8.30	9.00	Opening Remarks (30 Min.).
9.00	11.30	Discuss Course Major points: • Strategic Role of Budgeting & Financial Planning. • Advanced Budgeting Techniques & Forecasting. • Financial Statement Analysis: Tools & Techniques. • Variance Analysis & Performance Evaluation. • Integrating Financial Analysis with Strategic Decision-Making.
11.30	12.00	Coffee Break
12.00	14.00	Strategic Role of Budgeting & Financial Planning: • The purpose and evolution of budgeting in modern organizations. • Linking strategic objectives with operational budgets. • Types of budgets: incremental, zero-based, activity-based, and rolling. • Budget frameworks and cycle management. • Key elements of a master budget. • Coordination between departments in budget formulation. • Common pitfalls and how to avoid them.
14.00	14.30	Questions and Discussion
14.30		Buffet Lunch

(2nd Day) Agenda

9.00	11.30	Advanced Budgeting Techniques & Forecasting: • Forecasting methodologies: qualitative vs quantitative. • Regression analysis and trend projection. • Developing flexible and rolling budgets. • Scenario planning and “what-if” analysis.
11.30	12.00	Coffee Break
12.00	14.00	Advanced Budgeting Techniques & Forecasting: • Integrating budgets with KPIs and scorecards. • Forecasting under uncertainty and volatility. • Practical workshop: Preparing a rolling forecast model.
14.00	14.30	Questions and Discussion
14.30		Buffet Lunch

(3rd Day) Agenda

9.00	11.30	Financial Statement Analysis: Tools & Techniques: • Overview of financial statements: Income Statement, Balance Sheet, Cash Flow. • Analytical tools: horizontal, vertical, and ratio analysis. • Assessing liquidity, profitability, solvency, and efficiency ratios. • Trend and comparative analysis across periods.
11.30	12.00	Coffee Break
12.00	14.00	Financial Statement Analysis: Tools & Techniques: • Using common-size statements for benchmarking. • Financial performance interpretation for strategic decisions. • Case study: Real-world company financial analysis.
14.00	14.30	Questions and Discussion
14.30		Buffet Lunch

(4th Day) Agenda

9.00	11.30	Variance Analysis & Performance Evaluation: • Budget vs. actual performance: identifying and analyzing variances. • Types of variances: sales, cost, volume, and efficiency. • Root cause analysis and corrective actions. • Linking variance results to performance rewards and accountability.
11.30	12.00	Coffee Break
12.00	14.00	Variance Analysis & Performance Evaluation: • Building dashboards for performance tracking. • Integrating variance analysis into continuous improvement systems. • Group exercise: Variance and KPI analysis simulation.
14.00	14.30	Questions and Discussion
14.30		Buffet Lunch

(5th Day) Agenda

9.00	11.30	Integrating Financial Analysis with Strategic Decision-Making: • Using financial analysis to support investment decisions. • Linking budgeting and performance to corporate strategy. • Capital budgeting fundamentals: NPV, IRR, and payback methods. • Risk analysis and sensitivity testing.
11.30	12.00	Coffee Break
12.00	14.00	Integrating Financial Analysis with Strategic Decision-Making: • Communicating results to senior management and stakeholders. • Building integrated financial planning systems. • Course wrap-up, group presentations, and action planning.
14.00	14.30	Questions, Discussion & Conclusion Training Course.
14.30		Buffet Lunch