

Financial Planning & Analysis and Business Performance Management

Custom Education Programs

- Custom Programs tailored to meet your Objectives
- May be incorporated into FP&A Transformation Project
- Delivered by former CFO turned educator and author



Select and Combine Modules to Fit Your Specific Objectives

Fundamentals and Key FP&A Capabilities

- I. Financial Statement Analysis
- II. 10 Key Analytical Tools
- III. Modelling Financial Results and Transactions
- IV. Building Analytical Capability
- V. Presenting and Communicating Biz Information

Planning and Analysis for Critical Business Drivers

- XIII. Revenue and Gross Margins
- XIV. Operating Efficiency: Costs and Expenses
- XV. Cash Flow and Capital Management: Working Capital
- XVI. Cash Flow and Capital Management: Capital Assets
- XVII. Risk and the Cost of Capital

Performance Management

- VI. Keys to Effective Performance Management
- VII. Developing KPI's and Dashboards
- VIII. Measuring Agility, Innovation and Human Capital
- IX. Benchmarking Performance and Competitor Analysis

Valuation and Capital Investment Decisions

- XVIII. Capital Investment Decisions- Intro and Key Concepts
- XIX. Capital Investment Decisions- Dealing with Risk and Uncertainty
- XX. Business Valuation and Value Drivers
- XXI. Planning & Analysis of Mergers and Acquisitions

Business Projections and Plans

- X. Business Projections and Plans: Best Practices
- XI. Budgets, Plans and Rolling Forecasts
- XII. Long Term Projections

FP&A Transformation

- XXII. Developing and Executing the FP&A Transformation Plan

Client Reviews:

"Jack combines experience as a CFO and educator to deliver highly effective sessions. Participants were very engaged and came away with tangible concepts to improve our FP&A capabilities."

-David Inman, CFO

"Jack led a 2-day financial development workshop covering critical FP&A capabilities such as modeling, investment decision support and presenting financial information. The content and sessions were both comprehensive and pragmatic. Jack was very effective in augmenting technical/theoretical training with observations and anecdotes from his real-world experience as a CFO."

-Mike Rossi, CFO

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 and "FP&A and Performance Management," Wiley, 2018. Jack served as Controller and CFO of EG&G Inc. (renamed PerkinElmer), a diversified \$2.5b public company. He taught Corporate Finance and Advanced Finance electives in the MBA and Executive Education programs at Babson College from 2000-2010. He is a frequent speaker on FP&A and business performance management and is President of Jack Alexander and Associates, LLC.

Books by Jack Alexander



"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