

Advanced Executive Finance & Strategic Planning

Master aligning financial goals with long-term vision for executives and strategic planners.

Business Instructor: David Miller • 5 sections • 49 lessons • 18.75h total

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About this course

Executives often find that financial decisions made in isolation fail to support the broader business vision, leading to inefficiencies and missed opportunities. This course addresses the challenge of integrating financial strategy with long-term goals, a common pain point for C-suite leaders. You'll explore how to set financial targets that drive vision, manage risks, and communicate effectively to stakeholders. The course includes video lectures, real-world case studies, and practical exercises to help you apply concepts directly to your organization.

Course curriculum

Foundations and Preparation

- **Understanding the Executive Finance Landscape (18m)**
Overview of key financial concepts for executives and why alignment with vision matters.
- **Defining Long-Term Business Vision (25m)**
Step-by-step guide to articulating and communicating your organization's vision.
- **Financial Goal Setting for Strategic Impact (32m)**
How to set financial goals that support long-term objectives, with real-world examples.
- **Stakeholder Analysis and Financial Priorities (12m)**
Identifying key stakeholders and aligning their financial interests with vision.
- **Risk Assessment in Strategic Finance (18m)**
Evaluating financial risks and their impact on long-term plans.
- **Building a Financial Strategy Framework (25m)**
Creating a structured approach to integrate finance and strategy.
- **Case Study: Vision-Driven Financial Planning (20m)**
Analyzing a company that successfully aligned finance with vision.

Core Concepts

- **Time Value of Money in Strategic Decisions (25m)**
Applying TVM concepts to evaluate long-term investments.
- **Capital Budgeting for Vision Alignment (32m)**
Techniques for prioritizing capital projects that support strategic goals.
- **Financial Forecasting and Scenario Planning (18m)**
Building forecasts that account for vision-driven changes.
- **Cost Management for Strategic Advantage (25m)**
Aligning cost structures with long-term objectives.
- **Revenue Models and Growth Strategies (32m)**
Designing revenue streams that fuel vision achievement.
- **Debt vs. Equity: Strategic Financing Choices (18m)**
Choosing financing options that support vision without compromising stability.
- **Performance Metrics Aligned with Vision (12m)**
Selecting KPIs that measure progress towards long-term goals.
- **Integrating ESG Factors into Financial Planning (25m)**
How environmental, social, and governance issues affect long-term finance.
- **Case Study: Capital Allocation in Visionary Companies (20m)**
Examining how leading firms allocate capital to align with vision.

Deep Dive

- **Advanced Financial Modeling for Strategy (32m)**
Building complex models to test vision alignment scenarios.

- **Mergers & Acquisitions as Strategic Tools (25m)**
Using M&A to accelerate vision achievement, with risk assessment.
- **Tax Strategy and Long-Term Vision (18m)**
Optimizing tax positions to support strategic financial goals.
- **Working Capital Management for Stability (25m)**
Ensuring operational finance supports long-term plans.
- **Financial Communication to Boards and Investors (32m)**
Presenting financial strategies that align with vision to stakeholders.
- **Scenario Stress Testing (18m)**
Testing financial plans under various vision-related scenarios.
- **Innovation Funding and R&D Investment (25m)**
Balancing innovation costs with strategic financial returns.
- **Case Study: Turnaround with Vision Focus (20m)**
A deep dive into a company that realigned finance with vision during a crisis.

Advanced Application

- **Crafting a Vision-Aligned Financial Plan (32m)**
Step-by-step guide to developing a comprehensive financial plan.
- **Implementing Strategic Financial Controls (25m)**
Setting up systems to monitor vision alignment.
- **Dynamic Budgeting for Changing Visions (18m)**
Adjusting budgets as vision evolves, with practical techniques.
- **Cross-Functional Alignment of Finance and Strategy (25m)**
Ensuring all departments contribute to vision-aligned financial goals.
- **Leading Financial Transformation Projects (32m)**
Managing change initiatives to improve finance-strategy integration.
- **Global Finance and Vision Consistency (18m)**
Aligning financial strategies across international operations.
- **Ethical Decision-Making in Strategic Finance (12m)**
Navigating ethical dilemmas when aligning finance with vision.
- **Technology Integration for Financial Strategy (25m)**
Using tools like AI and data analytics to enhance vision alignment.
- **Building Resilient Financial Strategies (32m)**
Creating finance plans that withstand disruptions while staying true to vision.
- **Negotiation Skills for Strategic Financial Deals (18m)**
Negotiating terms that support long-term vision in partnerships and agreements.
- **Case Study: Vision-Driven Financial Turnaround (25m)**
Analyzing a real company's financial strategy aligned with a new vision.
- **Workshop: Developing Your Financial Vision Statement (20m)**
Interactive session to draft a personal or organizational financial vision.

Implementation & Next Steps

- **Creating an Action Plan for Vision Alignment (25m)**
Translating learning into actionable steps for your organization.
- **Monitoring and Adjusting Financial Strategies (18m)**
Continuous improvement techniques for ongoing alignment.
- **Leadership Communication for Financial Vision (32m)**
How to communicate and champion vision-aligned finance.
- **Future Trends in Executive Finance (25m)**
Preparing for upcoming changes in finance and strategy.
- **Personal Development as a Strategic Finance Leader (12m)**
Skills and habits to enhance your effectiveness.
- **Case Study: Long-Term Vision in Action (20m)**
A multi-year case of successful vision-financial alignment.
- **Building a Culture of Financial Vision Alignment (18m)**
Fostering team commitment to aligned financial goals.
- **Risk Management in Vision Implementation (25m)**
Identifying and mitigating risks during vision execution.
- **Financial Innovation for Vision Achievement (32m)**
Creative financial solutions to meet long-term objectives.
- **Collaboration with External Partners (18m)**
Working with consultants, advisors, and partners on vision-aligned finance.
- **Evaluating Success: Metrics for Vision-Financial Alignment (12m)**
How to measure if your financial strategies are achieving vision.
- **Next Steps: Continuing Your Journey (20m)**
Resources and strategies for ongoing learning and application.
- **Final Project: Comprehensive Vision-Financial Strategy (32m)**
Apply all concepts to develop a full strategy for a hypothetical or real scenario.

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