

Business Strategy & Financial Acumen for Managers

Develop the skills to analyze markets, make data-driven decisions, and lead your team with confidence.

Business Instructor: Manuel Heard • 5 sections • 53 lessons • 17.75h total

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About this course

Many managers excel in their technical roles but find themselves unprepared for the strategic and financial aspects of leadership. Decisions based on guesswork can lead to missed opportunities and budget overruns. This course bridges that gap, giving you a solid foundation in both areas.

You'll learn core frameworks for strategic planning and financial analysis through practical video lessons, real-world case studies, and problem-solving exercises. We start with the basics and build up to advanced applications, so you can immediately apply what you learn to your work.

Course curriculum

Foundations and Preparation

- **Why Strategy and Finance Matter for Your Role (12m)**
Understand the direct link between strategic thinking, financial health, and your daily management decisions.
- **Core Business Strategy Terminology (18m)**
A clear glossary of key terms like mission, vision, and competitive advantage, explained with simple examples.
- **Introduction to Financial Acumen (15m)**
Grasp fundamental financial concepts such as revenue, profit, and cash flow without complex jargon.
- **Mapping Your Organization's Business Model (20m)**
Use a step-by-step guide to diagram how your company creates, delivers, and captures value.
- **The Data-Driven Manager: Using Information Wisely (14m)**
Learn where to find reliable data and how to avoid common analysis pitfalls that skew judgment.
- **Setting Goals That Align Strategy and Finance (16m)**
Connect high-level objectives to measurable financial and operational targets for your team.
- **Reading Financial Statements: Income Statement (22m)**
Walk through a real income statement to identify revenue streams, costs, and profitability drivers.
- **Reading Financial Statements: Balance Sheet and Cash Flow (25m)**
Interpret assets, liabilities, and cash movements to assess organizational stability and liquidity.

Core Concepts

- **Analyzing the External Environment with PESTLE (18m)**
Apply the PESTLE framework to spot political, economic, and social trends affecting your business.
- **Competitive Analysis Using Porter's Five Forces (22m)**
Evaluate industry competition, supplier power, and customer influence to shape your strategy.
- **Conducting a SWOT Analysis for Your Team (15m)**
A practical session to identify internal strengths and weaknesses alongside external opportunities and threats.
- **Cost Behavior and Break-Even Point (20m)**
Calculate fixed and variable costs to determine how many units you need to sell to cover expenses.
- **Building and Managing a Departmental Budget (25m)**
Step-by-step guide to creating a realistic budget, tracking variances, and making adjustments.
- **Forecasting Techniques for Sales and Expenses (18m)**
Use historical data and simple models to project future performance with greater accuracy.
- **Capital Investment Decisions: NPV and IRR (30m)**
Learn to evaluate projects using Net Present Value and Internal Rate of Return with clear examples.
- **Key Financial Ratios for Performance Insight (20m)**
Interpret profitability, liquidity, and solvency ratios to gauge financial health at a glance.

- **Strategic Positioning: Finding Your Niche (16m)**
Identify where your product or service fits in the market to build a sustainable competitive edge.
- **Risk Assessment in Strategic Planning (22m)**
Develop a method to identify, evaluate, and prioritize risks that could derail your plans.
- **Integrating Strategy and Finance into One Plan (24m)**
See how financial constraints and strategic goals interact to create a cohesive action plan.
- **Basic Financial Modeling for Managers (28m)**
Build a simple spreadsheet model to test assumptions and forecast outcomes for a business scenario.

Deep Dive

- **Advanced Variance Analysis for Cost Control (25m)**
Dig into budget vs. actual reports to pinpoint why variances occurred and how to respond.
- **Strategic Pricing for Profit Maximization (20m)**
Set prices based on cost, competition, and customer value, not just gut feeling.
- **Working Capital Management Essentials (18m)**
Optimize inventory, receivables, and payables to keep cash flowing smoothly.
- **Mergers and Acquisitions: A Manager's View (22m)**
Understand the financial and strategic rationale behind M&A, with a focus on integration challenges.
- **Scenario Planning for Uncertainty (16m)**
Create multiple future scenarios to prepare flexible strategies that adapt to change.
- **Choosing the Right Performance Metrics (KPIs) (14m)**
Select KPIs that align with strategy and provide actionable insights, not just data overload.
- **Cost Reduction Without Damaging Quality (19m)**
Identify wasteful processes and implement lean practices to improve margins sustainably.
- **Ethical Dilemmas in Business Decisions (17m)**
Navigate common ethical conflicts where financial pressure meets strategic goals.

Advanced Application

- **Case Study: Strategic Turnaround at a Retail Firm (32m)**
Analyze how a company used financial repositioning and market analysis to recover from losses.
- **Problem-Solving Session: Real Financial Challenges (28m)**
Work through authentic manager-level problems, from cash flow crunches to budget cuts.
- **Building a Business Case for a New Initiative (25m)**
Structure a proposal with financial projections and strategic alignment to win stakeholder approval.
- **Negotiation Skills with Financial Impact (20m)**
Prepare for negotiations by understanding cost structures, pricing levers, and trade-offs.
- **Communicating Strategy to Your Team and Executives (18m)**
Craft clear messages that translate complex plans into understandable goals for different audiences.
- **Adapting Strategy When Markets Shift (22m)**
Learn to reassess and pivot your approach using agile principles and financial checkpoints.
- **Using Data Analytics Tools for Strategic Insights (24m)**
Explore how to use tools like Excel or BI software to uncover patterns and support decisions.

- **Leading Teams Through Strategic Change (19m)**
Manage resistance and motivate staff when implementing new strategies or financial controls.
- **Cross-Functional Collaboration for Better Results (16m)**
Break down silos between departments to align efforts and improve overall performance.
- **Lessons from Failed Strategies: Case Analyses (27m)**
Study real examples where strategies missed the mark and extract practical takeaways.
- **Workshop: Develop Your Own Strategy Outline (30m)**
Apply all concepts to draft a strategic plan for a sample business or your own role.
- **Feedback Session on Your Strategy Draft (25m)**
Get structured guidance on refining your plan, focusing on financial viability and clarity.

Implementation & Next Steps

- **Creating a 90-Day Strategic Action Plan (22m)**
Break your strategy into short-term, actionable steps with clear owners and deadlines.
- **Setting Up a Financial Dashboard for Monitoring (20m)**
Design a simple dashboard to track key metrics and spot issues before they escalate.
- **Continuous Improvement Cycles in Strategy (18m)**
Use feedback loops to regularly review and adjust your approach for ongoing gains.
- **Building Financial Awareness in Your Team (15m)**
Educate team members on basic finance so they understand how their work affects the bottom line.
- **Mentoring for Strategic Leadership Growth (14m)**
Develop your ability to coach others on strategic thinking and financial responsibility.
- **Staying Current with Industry Trends (12m)**
Identify reliable sources and methods to keep your knowledge updated without overwhelm.
- **Networking and Peer Learning Strategies (10m)**
Leverage professional networks to exchange insights and solve common challenges.
- **Reviewing and Refining Your Strategy Quarterly (16m)**
Establish a routine for assessing progress and making necessary pivots.
- **From Metrics to Meaningful Outcomes (18m)**
Connect KPI results to actual business impact, moving beyond numbers to narrative.
- **Scaling Your Influence as a Manager (19m)**
Apply your new skills to drive change beyond your immediate team or department.
- **Curated Resources for Ongoing Learning (14m)**
A list of books, podcasts, and tools to deepen your strategy and finance expertise.
- **Final Project: Present Your Integrated Plan (32m)**
Compile your work into a final presentation that demonstrates strategic and financial thinking.
- **Course Wrap-Up: Key Takeaways and Next Actions (12m)**
Recap the core lessons and outline concrete steps to continue your development.

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