

AGILE FINANCE BOOT CAMP

3 Days Classroom
3 Days Live Online

Individual: \$2750

Group: \$2550

GSA: \$2007.50

Credits: 21 PDUs

REGISTER HERE:

www.cprime.com/learning

COURSE OVERVIEW

Led by senior innovators who have worked with both finance teams in Fortune organizations and major accounting firms on how to guide their clients, this workshop is a fast-paced experience that shows you how your own finance teams can become transformative enablers of agility throughout the organization.

COURSE OUTLINE

Part 1: Challenges of Conventional Financial Management

1. Goals and Goal-Driven Behavior
2. Value vs. Cost
3. Challenges of Annual Budgeting and Long Cycle Times
4. Challenges of Project-Oriented Budgeting
5. Reconciliation with Bank Accounts and the General Ledger
6. Discovery of Data Entry Issues Across All Systems and Reports
7. Your Finance Department's Reputation

Part 2: The Business Case for Agile Finance

1. Enterprise Agility Overview
2. How does Reporting Happen in Agile Organizations?
3. Key Competencies for Agile Finance Teams
4. How Roles are Impacted

Part 3: Key Concepts for Agility in Finance

1. Creating Customer Value
2. Value vs. Cost
3. Value Streams
4. Measurement and Feedback
5. Epics, Portfolios and Programs
6. Prioritization and Cost of Delay
7. Products vs. Projects
8. From Exploration to Exploitation
9. Common Constructs Used by Frameworks for Agile-at-Scale?(i.e. SAFe)

Part 4: Agile Budgeting

1. Establishing Visibility and Feedback into Workflows
2. Cost Management for Agility

3. Forecasting and Targeting
4. Frequency: Allocating Funding vs. Fixed Budgets
5. Increment-Driven Budgeting
6. Resource Allocation

Part 5: Insights – Measurement and Analytics for Financial Agility

1. OKRs and Metrics for Financial Agility
2. Approaching Real-Time Insight
3. Materiality in the Business
4. Assessing the Accuracy of OKRs
5. Comparing What's Planned vs. What's Achieved
6. Designing Actionable Metrics and Feedback Mechanisms
7. Data Frameworks for Informing Adaptive Finance

Part 6: Automation

1. Financial Planning and Analysis
2. Financial Consolidation of Reports
3. Reconciliation
4. Discovery of Data Entry Issues Across All Systems and Reports
5. Automation of Coordination with Vendors to Address Payment Delays

Part 7: Contracts and Procurement

1. Conventional vs. Alternative Contracts
2. Mutual Benefit and Partner Ecosystems
3. Incentives vs. Penalties
4. Feedback on Contracts
5. Legality Concerns

See website for full outline

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