Financial Analysis for Decision Support Course: From Financial Data to Management Decisions



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Introduction:

Financial Analysis for Decision Support Course: From Financial Data to Management Decisions is a 3-day course for financial analysts, budget analysts, management accountants and finance business partners, ending with a Decision Support Pack of a working spreadsheet model and a decision memo. Management often receives monthly figures without explanation, so variances, cost behaviour and the effect of options on profit and cash stay unclear when decisions are taken. Nominees already prepare budgets, monthly reports or costing work and practise through spreadsheet modelling builds. CoreConcept Training Center delivers this financial analysis for decision support course.

Course Objectives:

- Interpret monthly management reports, budgets and internal financial statements to frame the decision question management faces
- Analyse budget versus actual results with price, volume and mix variances and explain the causes in plain language
- Apply cost behaviour, contribution margin and break-even analysis to pricing, volume and service level choices
- Evaluate make-or-buy, outsourcing and product decisions with relevant costs and opportunity costs
- Appraise investment proposals with payback, net present value and sensitivity analysis on key assumptions
- Produce a Decision Support Pack with a spreadsheet model, indicator dashboard and a recommendation memo for management

Target Audience:

- Financial analysts responsible for preparing monthly analysis and commentary for management
- Budget analysts responsible for building budgets, forecasts and spending follow-up reports
- Management accountants responsible for product, service and departmental costing
- Finance business partners responsible for supporting operational managers with numbers and options
- Planning and performance staff responsible for financial indicators and management dashboards

Course Outline:

Day 1: Reading Internal Financial Information and Variance Analysis

- Management Report Pack Structure and Decision Question Framing
- Internal Profit and Loss by Unit, Product and Service
- Budget Versus Actual Report with Flexed Budget Comparison
- Price, Volume and Mix Variance Calculation and Commentary
- Key Financial Indicator Set for a Monthly Dashboard

Day 2: Cost Behaviour, Relevant Costing and Investment Appraisal

- Fixed and Variable Cost Classification with Contribution Margin
- Cost-Volume-Profit Model and Break-Even Point Calculation
- Relevant Cost Analysis for Make-or-Buy and Outsourcing
- Payback Period and Net Present Value Investment Appraisal
- Scenario and Sensitivity Tables for Key Decision Assumptions

Day 3: Modelling Build and the Decision Support Pack

- Multi-Sector Case Data from Manufacturing, Services and Public Bodies
- Spreadsheet Model Layout with Inputs, Calculations and Outputs
- Option Comparison Using Variance, Break-Even and Investment Results
- Decision Memo Structure with Recommendation, Risks and Next Steps
- Decision Support Pack Completion and Peer Challenge Review

Skills You Will Gain:

- Management Report Interpretation
- Variance Analysis
- Cost Behaviour Analysis
- Break-Even Modelling
- Relevant Costing
- Investment Appraisal
- Sensitivity Analysis
- Decision Memo Writing

Why Attend This Course:

- Deliver a Decision Support Pack with model, dashboard and recommendation memo to the finance director or the manager who owns the decision
- Recommend whether to accept, reprice, outsource or invest based on contribution, relevant cost and net present value evidence
- Prevent approvals based on headline figures alone, which lead to loss-making prices, unfunded projects and repeated budget overruns
- Coach colleagues in variance commentary, break-even checks and the shared spreadsheet layout used across the finance team

Conclusion:

Back at work, the participant presents the Decision Support Pack to the finance director or the operational manager who owns the decision, using the model to compare options on profit, cash and risk before approval. Budget holders can reuse the variance dashboard each month, and the finance team can apply the same spreadsheet layout to new proposals. After the first decision is implemented, the unit should compare actual results with the model's assumptions and update the indicators and sensitivity ranges.

Frequently Asked Questions FAQ:

What should participants know before a financial analysis for decision support course?

Participants should be comfortable with spreadsheets and know how their organisation's budget and monthly reports are built. Bringing a recent management report or a pending decision, such as a pricing or investment proposal, lets them apply the models to real figures.

How does financial analysis for decision support differ from analysing published financial statements?

This course analyses an organisation's own internal figures to support management choices on pricing, costs and investments. Analysis of published financial statements reviews other companies' annual reports, usually for credit or investment opinions, using ratio and earnings quality tests.

Which methods are most used in financial analysis for decision support?

The most used methods are budget variance analysis, contribution margin and break-even analysis, relevant costing, payback and net present value, and scenario or sensitivity tables. Together they show how each option affects profit, cash and risk.

What do participants take back from a financial analysis for decision support course?

Participants take back a Decision Support Pack containing a working spreadsheet model, a monthly indicator dashboard, variance commentary templates and a decision memo with a recommendation, risks and next steps, ready to adapt to their next proposal.