



Strategic Financial Leadership Course for CFOs and Finance Directors



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Introduction:

Strategic financial leadership for CFOs and finance directors is a 5-day course for senior finance leaders who set financial policy, steer capital and lead the finance function, ending with a Financial Strategy and Capital Allocation Plan for a case company. Organisations lose value when financial strategy drifts away from corporate strategy, capital is spread by habit and boards receive figures without a clear recommendation. Nominees already run finance at executive level, and the course is taught through case study work on board papers, forecasts and funding scenarios. CoreConcept Training Center delivers this strategic financial leadership course.

Course Objectives:

- Define the CFO mandate and decision rights and align financial strategy with the organisation's corporate priorities
- Diagnose how the organisation creates value using economic profit, value driver trees and total shareholder return decomposition
- Prioritise capital allocation and set a funding strategy and target capital structure corridor for board approval
- Cascade financial KPIs and steer performance through rolling forecasts and scenario testing
- Set a financial risk appetite statement and lead the redesign of the finance operating model
- Present a Financial Strategy and Capital Allocation Plan to boards, investors and lenders

Target Audience:

- Senior finance executives accountable for financial strategy, financial policy and the finance function
 - Finance leaders of divisions or subsidiaries who report to a group finance head
 - Executives responsible for treasury, funding and relationships with lenders and investors
 - Heads of planning and performance who steer forecasts and KPIs for executive committees
 - Senior finance leaders being prepared to take on the top finance role
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Course Outline:

Day 1: The Strategic CFO Role and Finance Leadership Baseline

- CFO Role Spectrum From Steward to Strategist and Catalyst
- CFO Mandate and Decision Rights With the CEO and Board
- Financial Strategy Alignment Map Against Corporate Strategic Priorities
- Stakeholder Expectations Matrix for Owners, Lenders and Executives
- Finance Function Maturity Diagnostic and Leadership Gap Review

Day 2: Value Creation Models and Financial Strategy Frameworks

- Shareholder Value Logic and Economic Profit Spread Analysis
- Value Driver Tree Linking Growth, Margin and Capital Intensity
- Total Shareholder Return Decomposition for Strategy Reviews
- Financial Policy Framework Setting Leverage, Liquidity and Payout Targets
- Strategic Finance Scorecard Balancing Growth, Returns and Resilience

Day 3: Capital Allocation, Funding Strategy and Performance Steering

- Capital Allocation Governance and Investment Prioritisation Scorecard
- Strategic Versus Maintenance Capex Envelopes and Stage-Gate Funding
- Funding Strategy Roadmap Across Debt, Equity and Hybrid Sources
- Credit Rating Metrics and Target Capital Structure Corridor
- Driver-Based KPI Cascade From Board Targets to Business Units

Day 4: Forecasting Under Uncertainty, Risk Appetite and Finance Transformation

- Rolling Forecast Design and Driver-Based Planning Cadence
- Scenario and Stress Testing of the Multi-Year Financial Plan
- Financial Risk Appetite Statement With Limits and Escalation Triggers
- Finance Operating Model Redesign With Automation and Analytics
- Finance Talent Strategy and Executive Business Partnering Charter

Day 5: Case Study Building a Financial Strategy and Capital Allocation Plan

- Case Company Value Diagnostic Using the Value Driver Tree
 - Capital Allocation Shortlist and Funding Plan for the Case
 - Board Paper Storyline for a Financial Strategy Recommendation
 - Investor and Lender Briefing Rehearsal With Panel Challenge
 - Financial Strategy and Capital Allocation Plan Completion
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Skills You Will Gain:

- Financial Strategy Formulation
- Value Creation Diagnosis
- Capital Allocation Governance
- Funding Strategy Design
- Enterprise Performance Steering
- Risk Appetite Setting
- Finance Function Transformation
- Board and Investor Communication

Why Attend This Course:

- Deliver a Financial Strategy and Capital Allocation Plan to the chief executive, the board and its investment committee
- Decide which investments to fund, defer or stop, and which funding source fits each one
- Avoid covenant pressure, rating downgrades and repeated forecast misses that erode board confidence
- Coach finance managers to build driver-based forecasts, KPI cascades and board-ready papers

Conclusion:

Back at work, the participant presents the Financial Strategy and Capital Allocation Plan to the chief executive, the board and the investment committee. They use it to decide which investments receive capital, how the next funding round is structured, which KPIs the executive team is measured on and where the finance function invests in people and systems. After the first planning cycle under the plan, the organisation should compare forecast accuracy, return on capital, funding headroom and the time finance spends on decision support against the baseline, and revise the policy targets that have not held.

Frequently Asked Questions FAQ:

What should participants know before the strategic financial leadership course for CFOs and finance directors?

Participants should already lead a finance function or a major finance area and be familiar with financial statements, budgets and investment appraisal. The course does not teach these techniques. Bringing an anonymised strategy, forecast or funding paper helps them apply the case work to their own organisation.

How does strategic financial leadership for CFOs and finance directors differ from a corporate finance course?

It concentrates on the leadership decisions of the top finance role: setting financial policy, steering capital, funding and performance, leading the finance team and persuading boards. Corporate finance courses teach calculation techniques such as discounting and cost of capital, which appear here only briefly.

What is a financial risk appetite statement in strategic financial leadership?

A financial risk appetite statement sets how much leverage, liquidity pressure, earnings volatility and currency or interest exposure the organisation accepts in pursuit of its strategy. The finance leader translates it into limits and escalation triggers that the board approves and monitors.

What do participants take back from the strategic financial leadership course for CFOs and finance directors?

Participants take back a Financial Strategy and Capital Allocation Plan for a case company, with a value driver diagnostic, an investment shortlist, a funding roadmap, a KPI cascade, a risk appetite statement and a board paper storyline they can adapt to their own organisation.