

ALIGNING **FINANCE** WITH **STRATEGY**



Course Facilitator:
ALAN FELL

- A highly experienced specialist in corporate performance management
- More than 25 years in a wide range of performance management disciplines
- A consultant and trainer for the last 18 years.

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This paper outlines a one-day Masterclass on aligning Finance with the Business Strategy of an organisation

Background

- The majority of organisations fail to execute their business strategies successfully. The failure rate is widely quoted at around 70%.
- One of the common weaknesses contributing to this extraordinary failure rate is that of mis-alignment between Finance and Strategy.
- This unique focused Masterclass addresses the subject from two distinct perspectives:
 - i. ***What are the Financial Goals and supporting Strategies of the organisation? Just saying “profit” is most definitely not enough.***
 - ii. ***How can organisations align the predominantly top-down business strategy with the bottom-up financial budget?***

Overall approach

- The focus of the course is to consider finance from the perspective of strategy management. If the organisation aims to achieve its Vision and Goals, and successfully implement the supporting strategies, how best can it align financial management with overall strategy management?
- Business strategy is primarily considered in terms of products / services, markets and customer segments. And then the supporting strategies of technology, distribution, and so on.
 - i. ***It is too common to find that an organisation describes its financial goal or strategy as simply “profit”. This course challenges that simplistic approach.***
- The format will be a mixture of presentation / discussion / case study examples (mainly from Alan Fell's extensive personal experiences). A template hand-out will be provided and delegates will be encouraged to “keep the score” as to how well their organisation aligns finance and strategy – and to identify areas for improvement.

Who should attend

- The course is suitable for all those in business, finance and strategy management roles across the organisation.
- It is aimed at managers and supervisors and does not require technical financial accounting knowledge.



Workshop agenda

Session	Subject
	PART 1 – Financial Goals and supporting Financial Strategies
1	Setting overall financial goal(s) of the organisation <ul style="list-style-type: none"> • Aligned with the Vision • Aligned with non-financial goals • Understanding the consequence of those goal(s) • Using a planning model to support goal validation
2	Developing relevant supporting financial strategies with special reference to: <ul style="list-style-type: none"> • Profitability and capital allocation • Cost targets and supporting strategies
	PART 2 - Aligning the top-down business strategy with the bottom-up financial budget
3	Overview and understanding that the execution of a business strategy requires the necessary financial and other resources to be in place.
4	Integrating top-down strategic planning with bottom-up budgeting – <ul style="list-style-type: none"> • exploring methodologies to manage this process and to avoid the disruptive “planning gap”





About Course Director

ALAN FELL

Director
Alan Fell Consultancy Ltd, UK

Alan is a UK-based specialist in Strategy Management and the Balanced Scorecard - with more than 23 years hands-on experience in "scorecarding". Formerly a Senior Executive with a major UK commercial bank, Alan is now a recognized subject matter expert in the Balanced Scorecard and the broader management challenges of Strategy Execution. He conducts training events across the world and is a repeat visitor to Pakistan. Since 2010 Alan has been a Senior Associate of the Balanced Scorecard Institute - BSI (www.balancedscorecard.org) and leads many of their training and consulting programs with a special focus on the Middle East. This program benefits from Alan's overall 45+ years' experience in business management.

The majority of his work is now undertaken internationally, especially in the Middle East/Gulf region, but also in the Far East, South Africa, Europe as well as the UK. Alan is an expert trainer and course leader. Over the last five years, he has led more than 100 conferences, seminars, and workshops concentrating on performance management disciplines in a wide range of international locations.

Alan's workshops in Pakistan have been attended by participants from Engro Polymer & Chemicals Ltd, Fatima Fertilizer (Fatima Group), Gul Ahmed Textile Mills, JS Private Equity, Ufone, Novatex Limited, Gatron Industries Ltd., Descon Ltd. Gul Ahmed Textile Mills, 1 Link, Silk Bank, Engro Polymer & Chemicals Ltd., HBL, et al.

Hear What Delegates Have Said About This Course In The Past

A very informed trainer. Made my concept clear. Thanking him a lot.

Tamim Shabbir, FCA - CFO, Al Baraka Bank

A very experienced & Thorough gentleman.

M. Hammad Anwer - Head of HR, Pak Kuwait Investment Company

"Alan Fell is an amazing talent who has an ability to trigger the constructive thought process during the training. This unique method was quiet helpful in learning"

M. Wasif - Senior Manager, Gul Ahmed Textile Mills

"Lot of knowledge on the subject. Alan showed us different ways of looking at strategy. Very clear and concise."

Sarah Ashar Hussain - Officer, Engro Polymer & Chemicals Ltd.

Alan Fell is a great trainer who presented this subject in a very simple and easy to understand manner. Value addition from this course is immerse.

Salman Qutb - Group Head - HR/ Admin, MCB Islamic Bank

Regular Tuition Fee: Rs. 45,000 per participant

Group Discount: 10% Discount on 2 or more nominations from the same organization

***15% Discount** for members of ICAP, ICMAP, IIA and CFA Society of Pakistan

Includes courseware, TerraBiz certificate, lunch, refreshments, and business networking

For registration(s), send us your **Name, Designation, Organization, Mobile, E-Mail and Postal Address** to register@terrabilgroup.com

For further information please contact **Marya Saeed**
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Terrabil Cancellation Policy:

For cancellations made in the 7 working days to the workshop, no refunds will be given. Cancellations must be confirmed by email. Substitutions may be made at anytime.



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*Discounts are mutually exclusive