



# Business Financial Intelligence Onsite Seminar



## Curriculum Overview

- completely customizable to Client needs

### Business financial intelligence (full-day seminar)

**Program summary** | Technical competence can only get you so far in your career. Over and above your technical ability its imperative you're able to manage yourself and positively influence others. But is there anything else? Yes – its called business financial intelligence!

Business financial intelligence is a mindset and skillset few people have and all organizations need. Having business acumen can help you expand your career over time across functional disciplines. Being the “language of business” it can also help you travel the global world of commerce. Business financial intelligence can help you make an even better contribution to your organization and will bring out the very best of you as a highly valuable employee.

### Course Objectives

**Our Business Model** | You will have increased confidence in your ability to understand how your organization makes money and see the correlation between the work you do every day and your organizations's business model.

**Profit and Working Capital** | You will better understand how you can improve profit margins and working capital efficiency within the company, regardless of your job role.

**Key Performance Indicators** | You will better understand the key performance indicators; how they're calculated and why these vital few measures are also important to shareholders.

**Understanding Financial Statements** | You will have increased confidence to be able to analyze the primary financial statements of not only your company but also, for your key competitors.



seminars



keynotes



coaching



online

## Outline

**Full-day seminar – 400 minutes** (assuming 60 minutes lunch and 2 x 10 minutes breaks)

Module	Title	Time
Module 1	Welcome, introductions and learning objectives	20 minutes
Module 2	So, what do we know?	40 minutes
Module 3	The 7 components of business financial intelligence	30 minutes
Module 4	Customers, Teams and Community	20 minutes

**Refreshment break** (10 minutes)

Module	Title	Time
Module 5	Cashflow	40 minutes
Module 6	Profit	40 minutes
Module 7	Productivity	40 minutes

**Lunch break** (60 minutes)

Module	Title	Time
Module 8	Growth	40 minutes
Module 9	Understanding the primary financial statements	50 minutes

**Refreshment break** (10 minutes)

Module	Title	Time
Module 10	Analyzing our performance for the last financial year	40 minutes
Module 11	Comparing our performance to competitors	30 minutes
Module 12	Summary, additional resources and course evaluation	10 minutes



## Module Summaries

### Module 1 | Welcome, Introductions and Learning Objectives (20 minutes)

**Objective:** To help participants feel welcome and to remove all distractions from the learning environment. Participants will sense an effective learning environment that is collegial, interactive and purposeful. They will understand why this subject is of importance and will have the opportunity to express their own expectations from today's investment in their professional development. This section will also include a brief overview of the day ahead.

Lesson 1	Opening Comments	5 minutes
Lesson 2	Introductions and Learning Objectives	5 minutes
Lesson 3	Learning Agreement	10 minutes

### Module 2 | So, What Do You Know? ~ Quiz (40 minutes)

**Objective:** Participants will be surprised by their own lack of knowledge (along with the lack of knowledge from other associates on the webinars) towards the financial performance of the company that employs them! Participants are encouraged to consider they would know these numbers if it were their own business. Participants begin to build confidence in understanding the financial language within the gameshow-type quiz that initially seemed daunting and are engaged with the promise they will be able to find and calculate the answers to these numbers "within less than 7 minutes" when the company financials are analyzed in the third webinars. Time is initially spent to ensure the related terminologies are understood.

Lesson 1	So, What Do You Know? ~ Quiz	10 minutes
Lesson 2	Demystifying the terminologies	30 minutes

### Module 3 | The 7 components of business financial intelligence (30 minutes)

**Objective:** The 7 components of business financial intelligence are briskly presented and the participants are engaged in a participative exercise that connects the work they do everyday to all of the components to a greater or lesser extent. Participants are able to see the interdependence between different parts of their company and how their work majors on one or more of the components. Participants also connect back all the terminologies from the previous module's quiz to the 7 components of business financial intelligence.

Lesson 1	The 7 components of business financial intelligence – an overview	5 minutes
Lesson 2	How do I impact some or all of these components in my work?	10 minutes
Lesson 3	How do these components work interdependently within Chubb?	10 minutes
Lesson 4	Connecting terminologies and measurements to components	5 minutes



## Module 4 | Customers, Teams and Community (20 minutes)

**Objective:** Participants will make the connection between financial results (cashflow, profit, productivity and growth) and the company's commitment to satisfy, exceed and anticipate customer needs while engaging the hearts and minds of employees and giving back to the community.

Lesson 1	Customers, Team and Community	10 minutes
Lesson 2	Making the connection between the 7 components	10 minutes

## Module 5 | Cashflow (40 minutes)

**Objective:** Participants will understand the 3 types of cashflow in a business and building upon their knowledge of how they impact cashflow, will be encouraged to consider how they can positively impact cashflow.

Lesson 1	3 types of cashflow	15 minutes
Lesson 2	Positively impacting cashflow	25 minutes

## Module 6 | Profit (40 minutes)

**Objective:** Participants will understand the 3 types of profit margin in a business and building upon their knowledge of how they impact profit, will be encouraged to consider how they can positively impact profit.

Lesson 1	3 types of profit margin	15 minutes
Lesson 2	Positively impacting profit	25 minutes

## Module 7 | Productivity (40 minutes)

**Objective:** Participants will understand how productivity is most-commonly measured in businesses and building upon their knowledge of how they impact productivity, will be encouraged to consider how they can positively impact productivity.

Lesson 1	Common productivity measurements	15 minutes
Lesson 2	Positively impacting productivity	25 minutes



## Module 8 | Growth (40 minutes)

**Objective:** Participants will understand how the 3 ways of measuring growth in businesses and building upon their knowledge of how they impact growth, will be encouraged to consider how they can positively impact growth.

Lesson 1	3 ways of measuring growth	15 minutes
Lesson 2	Positively impacting growth	25 minutes

## Module 9 | Understanding the primary financial statements (50 minutes)

**Objective:** Participants will understand the rudiments of and interconnectivity between an income statement, a balance sheet and a statement of cashflows.

Lesson 1	Income Statement	15 minutes
Lesson 2	Balance Sheet	15 minutes
Lesson 3	Statement of Cashflows	20 minutes

## Module 10 | Analyzing our performance for the last financial year (40 minutes)

**Objective:** Participants will review and analyze their own organization's performance for the last full financial year on cashflow, profit, productivity and growth.

Lesson 1	Review of the last full financial year	30 minutes
Lesson 2	Analysis of the last full financial year	10 minutes

## Module 11 | Comparing our performance to competitors (30 minutes)

**Objective:** Participants will review and analyze the competitor's performance for the last full financial year on cashflow, profit, productivity and growth.

Lesson 1	Review of the competitor performance for the last full financial year	20 minutes
Lesson 2	Analysis of competitor performance for the last full financial year and 5-year trend	10 minutes



## Module 12 | Summary, additional resources and course evaluation (10 minutes)

**Objective:** The learning from the seminar is summarized and participants are encouraged what they can do to continue to build upon their business financial intelligence.

Lesson 1	Review of learning	5 minutes
Lesson 2	Additional resources	2 minutes
Lesson 3	Closing comments and program evaluations	3 minutes

