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COURSE BROCHURE

Finance Business Intelligence and Analytics Training Course

4 – 8 January 2027
New York

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Registered in the United Kingdom and Saudi Arabia

Finance Business Intelligence and Analytics Training Course

Ref: 2746_104951 **Date:** 4 – 8 January 2027 **Location:** New York **Fees:** 9500 GBP

Finance Business Intelligence and Analytics is a 1-week training course for accountants, financial analysts and finance business partners who turn ledger records into a shared Finance Performance Insight Pack. Boards now expect finance to explain margin, cash and cost movements within days of period close, using figures that trace back to posted journals. Jupiter Prime Training presents Finance Business Intelligence and Analytics for finance teams.

Why Finance Business Intelligence and Analytics Matters Now

Three pressures shape finance analysis today. Executives expect faster answers on profitability by product, customer and site rather than a single consolidated figure. Treasury and operations leaders want forward views of cash that link receivables, payables and inventory. Auditors and controllers want every number on a dashboard to trace back to a posted journal. Teams that handle this well become trusted partners in pricing and investment decisions; others spend weeks reconciling conflicting spreadsheets. The course rests on established practice in dimensional modelling of accounting data, variance analysis and finance data quality control.

Who Gains Most from Finance Business Intelligence and Analytics

- Accountants responsible for ledger close, account mapping and reconciliations
- Financial analysts who prepare variance commentary and profitability breakdowns
- Finance business partners who explain margin drivers to commercial heads
- Treasury and cash officers who track liquidity, working capital and payment timing
- Management accountants who own cost allocation rules

The gain is largest when a finance team sends its close, planning and business partnering members together.

Finance Business Intelligence and Analytics Capabilities

Participants leave able to connect posted transactions to the margin, cash and cost questions that leaders bring to finance each month.

- Design a ledger data model with account, entity, cost centre and period dimensions — the finance controller
- Calculate contribution margin by product, customer and channel — pricing and commercial heads
- Build a rolling cash view linking receivables, payables and inventory days — the treasury lead
- Apply price, volume and mix variance decomposition to budget gaps — budget holders
- Specify finance data quality checks on mapping, completeness and reconciliation — auditors and controllers
- Communicate finance metrics through variance dashboards — the executive committee

Key Finance Business Intelligence and Analytics Terms

- Chart of accounts mapping — rules linking each ledger account to reporting lines such as revenue and overheads.
- Fact table — a table of measurable finance events, such as journal lines, keyed to descriptive dimensions.
- Contribution margin — revenue minus variable costs, showing what each product or customer adds towards profit.
- Cash conversion cycle — the days between paying suppliers and collecting from customers, combining receivable, payable and inventory days.
- Price, volume and mix variance — a split of the gap between actual and budget into its price, quantity and product mix effects.
- Reconciliation control — a check that totals in an analytical model agree with the posted ledger balance for the same period.

Finance Business Intelligence and Analytics Day by Day

Day 1: The Finance Question Landscape

- Stakeholder Question Inventory — Which Margin, Cash and Cost Questions Come First
- Ledger Source Mapping — Where Each Finance Figure Originates
- Chart of Accounts Hierarchies — Consistent Reporting Lines Across Entities
- Period Close Calendar Review — When Analytical Figures Can Be Trusted
- Finance Metric Catalogue — Agreeing Definitions Before Building Any Dashboard

Day 2: Modelling Ledger Data

- Journal Line Fact Tables — Grain Choices for Drill-Down to Source
- Entity, Cost Centre and Period Dimensions — Slicing Results Consistently
- Intercompany Elimination Logic — Avoiding Double Counting in Group Views
- Currency Translation Tables — Comparing Entities on One Basis
- Reconciliation Controls to Ledger Balances — Proving the Model Agrees

Day 3: Profitability and Cash Analysis

- Contribution Margin by Product and Customer — Pricing and Portfolio Choices
- Activity-Based Cost Allocation — Fair Overhead Charges to Business Units
- Receivable and Payable Ageing Analysis — Collection and Payment Priorities
- Cash Conversion Cycle Tracking — Working Capital Release Opportunities
- Thirteen-Week Cash Forecast Structure — Liquidity Headroom and Funding Timing

Day 4: Variance Insight and Finance Metrics

- Price, Volume and Mix Decomposition — Explaining Budget Gaps to Owners
- Rolling Forecast Comparison — Separating Timing From Permanent Differences
- Variance Dashboard Layout — Directing Attention to Material Movements
- Finance Data Quality Rules — Completeness, Mapping and Duplicate Checks
- Scheduled Refresh and Sign-Off Routine — Releasing Figures After Close

Day 5: Practising the Finance Performance Insight Pack

- Sector Case on Retail Margins — Applying Ledger Model and Margin Analysis
- Sector Case on Manufacturing Cash — Applying Ageing and Cash Cycle Views
- Variance Commentary Drafting — Applying Decomposition to a Real Month
- Peer Challenge on Metric Definitions — Testing Clarity for Executives
- Finance Performance Insight Pack Assembly — Model, Metrics and Commentary

Applying Finance Business Intelligence and Analytics After the Course

- Reconcile the team's profitability report to ledger balances and fix mapping gaps.
- Run a price, volume and mix variance review of the latest close with two budget holders.

Finance Business Intelligence and Analytics Questions FAQ

What is Finance Business Intelligence and Analytics and why does it matter now?

Finance Business Intelligence and Analytics is the practice of modelling ledger data to explain margin, cash and cost. It matters now because leaders expect finance to answer driver questions within days of close, with every figure traceable to posted journals.

Which roles gain most from Finance Business Intelligence and Analytics?

Accountants, financial analysts and finance business partners gain most. Accountants build the ledger model, analysts use it for variance work, and business partners explain results with it.

How does Finance Business Intelligence and Analytics differ from a financial modelling course?

Finance Business Intelligence and Analytics works on actual ledger data to explain what happened and why. A financial modelling course builds forward-looking valuation or budget models from assumptions.

What do you bring back from Finance Business Intelligence and Analytics?

You bring back a Finance Performance Insight Pack: a reconciled ledger model outline, agreed finance metric definitions, a margin and cash view and a variance commentary template ready to use at the next period close.

Finance Business Intelligence and Analytics: The Way Forward

The Finance Performance Insight Pack first informs which products, customers or sites deserve attention at the next close review. Controllers, analysts and business partners use it to speak from one set of reconciled figures. After its first use, revisit the metric definitions and cost allocation rules, as leaders' questions shift once they trust the numbers.