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COURSE BROCHURE

# AI for Finance and Strategic Planning Training Course

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Munich

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Registered in the United Kingdom and Saudi Arabia

# AI for Finance and Strategic Planning Training Course

**Ref:** 104_2621 **Date:** 1 – 5 March 2027 **Location:** Munich **Fees:** 6200 GBP

AI for Finance and Strategic Planning is a 1-week training course for FP&A managers, strategy and planning leads, CFO office staff and budget owners, ending with an AI-enabled planning calendar and forecast model pack for one business. Volatile demand, input costs and interest rates make annual budgets stale within weeks, and machine learning now produces driver-based forecasts and scenarios far faster. Jupiter Prime Training runs this AI for Finance and Strategic Planning course.

## Why AI for Finance and Strategic Planning Matters Now

Leadership teams ask for rolling forecasts and quick answers to what-if questions rather than a single annual budget. Investors and lenders probe the assumptions behind capital plans. Planning teams still rebuild spreadsheets by hand while demand signals, pricing data and operational drivers sit unused. A finance function that pairs driver models with machine learning forecasts and clear explanations reallocates capital sooner and with more confidence; one that does not either misses turning points or trusts black-box numbers it cannot defend. The course draws on ISO/IEC 42001 for AI management and the NIST AI Risk Management Framework NIST AI RMF for testing forecasting models.

## Who Gains Most from AI for Finance and Strategic Planning

- FP&A staff who own budgets, forecasts and the planning cycle
- Strategy and corporate planning leads who frame long-range plans
- CFO office staff who brief the board on capital choices
- Budget owners who commit departmental targets and spending
- Commercial and operations analysts who supply demand and cost drivers

A business gains most when FP&A, strategy and a few budget owners attend together and agree one driver tree, one forecast accuracy measure and one scenario set for leadership discussions.

## AI for Finance and Strategic Planning Capabilities

Participants build driver trees, forecasts and scenarios on realistic revenue and cost data, deciding where a model sharpens the plan and where judgement must override it.

- Build driver-based forecasting models linked to operational volumes and prices — FP&A leads
- Test machine learning demand and revenue forecasts against simple baselines — chief financial officers
- Design scenario and sensitivity models for leadership what-if questions — executive committees
- Calculate capital allocation options with risk-adjusted returns — investment committees

- Specify forecast accuracy tracking and bias measures — planning owners
- Communicate model logic and uncertainty to non-specialists — boards and budget holders

## Key AI for Finance and Strategic Planning Terms

- Driver-based forecasting — projecting financial results from operational drivers such as volumes, prices, headcount and conversion rates.
- Rolling forecast — a forecast updated each period that always looks the same number of months ahead.
- Scenario modelling — building alternative futures with different assumptions to test how plans and cash flows respond.
- Sensitivity analysis — changing one assumption at a time to see which drivers move results most.
- Forecast bias — a consistent tendency for forecasts to land above or below actual results.
- Capital allocation — choosing which projects, units or investments receive funding based on expected return and risk.

## AI for Finance and Strategic Planning Day by Day

### Day 1: Planning Under Uncertainty

- Planning Cycle Diagnostic — Budget, Forecast and Long-Range Plan
- Driver Tree Mapping — Linking Operations to Financial Results
- Consumer Goods and Energy Cases — Machine Learning in Planning
- Planning Data Inventory — Internal Drivers and External Signals
- Forecast Accuracy Baseline — Measuring Past Error and Bias

### Day 2: Machine Learning Forecasts

- Time-Series Forecasting Methods — Seasonality, Trend and Events
- Demand and Revenue Models — Using Price and Promotion Drivers
- Cost and Headcount Forecasts — Linking Plans to Operations
- Model Comparison Against Baselines — Choosing What to Trust
- Rolling Forecast Design — Horizon, Frequency and Ownership

### Day 3: Scenarios, Sensitivities and Strategy

- Scenario Modelling — Base, Downside and Upside Cases
- Sensitivity Analysis — Tornado Charts of Key Drivers
- Monte Carlo Simulation — Ranges Instead of Single Points
- Strategic Option Testing — Market Entry and Pricing Choices
- Early Warning Indicators — Triggers to Reforecast

## Day 4: Capital Allocation and Explainability

- Capital Allocation Models — Return, Risk and Strategic Fit
- Portfolio Rebalancing — Shifting Budgets Between Units
- Explaining Forecast Drivers — Feature Contributions for Leaders
- NIST AI RMF Measure Function — Forecast Model Testing
- ISO/IEC 42001 Controls — Model Ownership and Change Records

## Day 5: Practising the AI-Enabled Planning Calendar

- Driver Tree and Baseline From Day 1 — Planning Scope
- Forecast Models From Day 2 — Chosen Methods
- Scenario Set From Day 3 — Leadership Questions
- Allocation and Explanation From Day 4 — Board Narrative
- AI-Enabled Planning Calendar — Forecast Model Pack and Timetable

## Applying AI for Finance and Strategic Planning After the Course

- Rebuild next quarter's revenue forecast for one product line with a driver model and a machine learning model, then compare both with the current forecast.
- Run a downside scenario on the current capital plan and present the projects that would pause first to the CFO office.

## AI for Finance and Strategic Planning Questions FAQ

### What is AI for finance and strategic planning and why does it matter now?

AI for finance and strategic planning is the use of driver models, machine learning forecasts and scenario tools to plan and allocate resources. It matters now because volatility makes annual budgets stale quickly and leaders want faster, explainable answers.

### Which roles gain most from AI for finance and strategic planning training?

FP&A staff, strategy and planning leads, CFO office staff and budget owners gain most. Commercial and operations analysts also benefit, since they supply the drivers the models use.

### How does AI for finance and strategic planning differ from a course on AI for financial reporting?

It looks forward to forecasts, scenarios and capital choices rather than closing and reporting past results. You build driver models, rolling forecasts and allocation analyses.

### What do you bring back from AI for finance and strategic planning training?

You bring back an AI-enabled planning calendar with a forecast model pack, scenario set, accuracy measures and a board narrative for one business.

## AI for Finance and Strategic Planning: The Way Forward

The AI-enabled planning calendar informs the first planning decision: which forecasts move to driver and machine learning models in the next cycle and when leadership sees scenarios. FP&A, strategy and the CFO office use it together. After two forecast cycles, revisit accuracy and bias measures, because markets and internal drivers shift and models need retraining.