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COURSE BROCHURE

AI-Driven Strategic Financial Analysis Training Course

2 – 6 August 2027
New York

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Registered in the United Kingdom and Saudi Arabia

AI-Driven Strategic Financial Analysis Training Course

Ref: 1590_58326 **Date:** 2 – 6 August 2027 **Location:** New York **Fees:** 9500 GBP

AI-Driven Strategic Financial Analysis is a 1-week training course for finance managers, FP&A analysts and CFO office staff who use machine learning to diagnose performance, test strategic options and spot irregularities, and it ends with a Strategic Finance Insight Memo. Ledger volumes and board expectations now outpace manual spreadsheet review. Jupiter Prime Training delivers this course on AI-Driven Strategic Financial Analysis.

Why AI-Driven Strategic Financial Analysis Matters Now

Three pressures meet in the finance function: boards asking for sharper explanations of margin and cash movements, transaction volumes too large for sample-based checks, and machine learning now built into planning and ERP platforms. A finance office that applies these models with discipline finds profit leaks earlier and frames capital choices with tested scenarios; one that trusts unvalidated outputs risks misleading directors and overlooking misstatement. Model accountability in the course follows ISO/IEC 42001 artificial intelligence management system and the NIST AI Risk Management Framework NIST AI RMF.

Who Gains Most from AI-Driven Strategic Financial Analysis

- Finance business partners who explain margin, cost and working capital movements to divisions
- Planning analysts accountable for driver-based projections and sensitivity runs
- Controllers responsible for ledger integrity and unusual journal patterns
- Treasury and investment analysts who compare capital deployment options
- CFO office staff who prepare the financial narrative for directors

A CFO office sending a business partner, a planning analyst and a controller together gains most.

AI-Driven Strategic Financial Analysis Capabilities

Participants turn ratios and ledgers into explanations a board can act on, with the model evidence behind each claim.

- Prepare clean, labelled financial datasets from ledgers and sub-ledgers — model reliability
- Decompose profitability and return drivers with machine learning — divisional performance reviews
- Calculate variance attribution across price, volume and mix — budget holders
- Test strategic scenarios through simulation and sensitivity — capital allocation choices
- Apply anomaly detection to journals and payments — controllers and auditors
- Communicate model findings with stated confidence — board and audit committee

Key AI-Driven Strategic Financial Analysis Terms

- Value driver tree — a breakdown linking a headline measure such as return on capital to the operational levers that move it.
- Variance attribution — splitting the gap between actual and expected results into causes such as price, volume and mix.
- Gradient boosting — a machine learning method that combines many small decision trees to predict a financial outcome.
- Feature importance — a measure showing how much each input variable contributes to a model's prediction.
- Anomaly detection — techniques that flag transactions or balances departing sharply from learned normal patterns.
- Monte Carlo simulation — repeated random sampling of uncertain inputs to show the range of possible financial outcomes.

AI-Driven Strategic Financial Analysis Day by Day

Day 1: Finance Questions Worth Modelling

- Strategic Question Framing for the CFO Office — Choosing What to Model
- Value Driver Trees for Return on Capital — Locating Profit Levers
- Peer and Segment Benchmarking Sets — Relative Performance Judgement
- Forces Changing Finance Analysis — Data Volume and Board Scrutiny
- Use-Case Shortlist with Materiality Tests — Effort Versus Decision Impact

Day 2: Preparing Financial Data for Learning Models

- Ledger and Sub-Ledger Extraction Patterns — Consistent Chart of Accounts Mapping
- Feature Engineering from Ratios and Trends — Model Input Design
- Handling Seasonality, Restatements and One-Offs — Clean Training History
- Train, Test and Back-Test Splits — Honest Accuracy Measurement
- Data Lineage Log for Finance Models — Audit Trail Expectations

Day 3: Machine Learning for Performance Diagnosis

- Regression and Gradient Boosting for Margin Drivers — Divisional Explanations
- Price, Volume and Mix Variance Attribution — Budget Holder Conversations
- Driver-Based Projection Models — Cash and Working Capital Outlook
- Feature Importance and Explainability Charts — Defensible Model Reasoning
- Model Validation Under ISO/IEC 42001 and NIST AI RMF — Accountable Finance Models

Day 4: Scenarios, Capital Choices and Irregularities

- Monte Carlo Simulation of Revenue and Cost Ranges — Downside Exposure
- Sensitivity Tornado Charts — Ranking the Assumptions That Matter
- Capital Deployment Option Comparison — Investment, Buyback or Debt Reduction
- Unsupervised Anomaly Detection on Journals — Misstatement and Leakage Signals
- Payment Duplicate and Outlier Screening — Control Exceptions Follow-Up

Day 5: Practising the Strategic Finance Insight Memo

- Driver Diagnosis for a Live Business Case — Root Cause Statement
- Scenario Range for a Strategic Choice — Recommended Option
- Anomaly Findings Summary — Control Actions and Owners
- Board Narrative with Confidence Levels — Director Questions Anticipated
- Strategic Finance Insight Memo — Evidence, Options and Recommendation

Applying AI-Driven Strategic Financial Analysis After the Course

- Build a value driver tree for one division and test which levers explain last quarter's margin shift.
- Run anomaly detection on a month of manual journals and route flagged items to the controller.

AI-Driven Strategic Financial Analysis Questions FAQ

What is AI-Driven Strategic Financial Analysis and why does it matter now?

It is the use of machine learning to explain financial performance, test strategic scenarios and flag irregularities. It matters now because boards expect faster, evidence-backed answers while ledgers grow too large for manual review.

Which roles gain most from AI-Driven Strategic Financial Analysis?

Finance business partners, planning analysts, controllers and CFO office staff gain most. You benefit most if you explain results to directors or divisions and need models you can defend.

How does AI-Driven Strategic Financial Analysis differ from a financial close automation course?

It focuses on interpretation and strategic choice rather than processing speed. A close automation course streamlines reconciliations and postings; this one diagnoses performance drivers, simulates options and challenges unusual patterns.

What do you bring back from AI-Driven Strategic Financial Analysis?

You bring back an insight memo built on a real business question. It combines driver diagnosis, scenario ranges and anomaly findings into one recommendation ready for directors.

AI-Driven Strategic Financial Analysis: The Way Forward

The Strategic Finance Insight Memo first informs a capital or margin decision at the next board cycle, and it is read by the CFO, division heads and the audit committee. Examples from consumer goods and telecoms show how driver models travel across sectors. After its first use, revisit model validation, because financial patterns shift with pricing and cost changes.