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COURSE BROCHURE

FP&A Business Partnering and Management Reporting Packs Training Course

2 – 6 August 2027
Casablanca

FP&A Business Partnering and Management Reporting Packs Training Course

Ref: 1825_67035 **Date:** 2 – 6 August 2027 **Location:** Casablanca **Fees:** 4500 GBP

FP&A Business Partnering and Management Reporting Packs is a 1-week training course for FP&A analysts and finance managers who build forecasts and present performance to operational leaders, and each participant leaves with a draft monthly management reporting pack. Operating teams now expect finance to explain variances quickly and to model what happens next, not simply report the past. Jupiter Prime Training delivers FP&A business partnering as a working discipline for finance teams.

Why FP&A Business Partnering Matters Now

Three pressures shape FP&A business partnering today. Operational leaders want forward-looking numbers they can act on within the month, cloud planning platforms have shortened forecast cycles, and boards ask for clearer links between strategy, drivers and cash. A finance function that partners well helps sales, production and service heads reallocate resources before a gap widens; one that only circulates spreadsheets is bypassed and decisions are taken on instinct. The course rests on driver-based planning, rolling forecasts, the balanced scorecard and established data-visualisation principles for management reporting.

Who Gains Most from FP&A Business Partnering

- Analysts who maintain the forecast model and explain monthly movements against plan
- Finance managers who own the reporting calendar and the pack sent to executives
- Business unit controllers who sit with operations heads on cost and margin choices
- Planning specialists who run scenario requests from commercial and supply chain teams
- Reporting leads who design dashboards and decide which indicators reach the leadership table

A regional or divisional finance team gains most when its analysts and its finance manager attend together and agree one pack structure and one forecast rhythm.

FP&A Business Partnering Capabilities

The outcomes move participants from producing numbers to shaping operational choices with them.

- Build a driver tree that links volume, price and productivity to profit — operations heads
- Design a rolling forecast with a fixed horizon and light update cycle — the finance director
- Test upside and downside scenarios against cash and capacity limits — executive committees
- Structure a management reporting pack around exceptions rather than volume — board readers

- Communicate variance stories in operational language with a clear ask — budget holders
- Weigh competing resource requests using contribution and payback logic — commercial leaders

Key FP&A Business Partnering Terms

- Driver-based forecasting — projecting results from the operational quantities that cause them, such as units, headcount or utilisation, rather than from last year's figures.
- Rolling forecast — a forecast refreshed at regular intervals that always looks a fixed number of months ahead.
- Management reporting pack — the recurring set of statements, indicators and commentary that leaders use to judge performance and decide actions.
- Variance bridge — a chart that walks from plan to actual result, showing how much each driver contributed to the gap.
- Scenario model — a version of the forecast built on changed assumptions to show the effect of a plausible future event.
- Business partnering — the practice of finance staff working alongside operational leaders to inform decisions before they are taken.

FP&A Business Partnering Day by Day

Day 1: Finance as an Operational Partner

- Partnering Maturity Model — Where Finance Sits in Operational Decisions
- Stakeholder Map of Budget Holders — Whose Questions the Pack Must Answer
- Strategy-to-Driver Cascade — Linking Objectives to Measurable Operating Quantities
- Balanced Scorecard Perspectives — Choosing Indicators Beyond Profit
- Reporting Calendar Audit — Removing Late and Unused Reports

Day 2: Driver-Based Forecasting Models

- Driver Tree Construction — Separating Volume, Price and Mix Effects
- Unit Economics per Product Line — Margin Decisions for Sales Leaders
- Headcount and Capacity Drivers — Staffing Choices in Service Operations
- Model Layout Standards — Inputs, Calculations and Outputs Kept Apart
- Assumption Log — Tracing Each Forecast Number to an Owner

Day 3: Rolling Forecasts and Scenario Modelling

- Rolling Forecast Horizon Design — Balancing Effort Against Visibility
- Forecast Accuracy Tracking — Bias and Error by Business Unit
- Upside and Downside Scenarios — Capacity and Cash Limits Tested
- Sensitivity Tables — Which Drivers Move Profit Most
- Manufacturing and Retail Cases — Demand Shock Responses Compared

Day 4: Management Reporting Packs That Drive Action

- Exception-Based Pack Structure — What Leaders Read in Five Minutes
- Variance Bridge Charts — Explaining Plan to Actual Movements
- Visual Design Principles — Chart Choice for Executive Readers
- Commentary Writing — Cause, Consequence and Recommended Action
- Dashboard and Pack Alignment — One Version of Each Indicator

Day 5: Practising the Management Reporting Pack

- Driver Tree Applied to a Case Business — Forecast Rebuilt
- Scenario Briefing to an Operations Head — Resource Trade-Off Agreed
- Variance Story Rehearsal — Peer Challenge on Commentary Quality
- Investment Request Appraisal — Contribution and Payback Compared
- Draft Monthly Management Reporting Pack — Structure, Charts and Commentary

Applying FP&A Business Partnering After the Course

- Rebuild one business unit forecast on a driver tree and agree each assumption owner with the operations head.
- Pilot the exception-based pack for one month and collect reader feedback on what prompted action.

FP&A Business Partnering Questions FAQ

What is FP&A business partnering and why does it matter now?

FP&A business partnering is finance working beside operational leaders to shape decisions with forecasts and reporting. It matters now because planning cycles are shorter and leaders expect finance to explain what drives results and what to do next.

Which roles gain most from FP&A business partnering and management reporting packs?

FP&A analysts, finance managers and business unit controllers gain most. You benefit if you prepare forecasts, explain variances or produce the monthly pack that executives use to allocate resources.

How does FP&A business partnering differ from a financial statements analysis course?

It looks forward and inward rather than backward and outward. A statements analysis course judges published accounts; this course builds driver models, rolling forecasts and internal reporting packs that guide operational choices.

What do you bring back from FP&A business partnering and management reporting packs training?

You bring back a draft management reporting pack, a driver tree for one business line and a scenario template.

FP&A Business Partnering: The Way Forward

The draft monthly management reporting pack is the first thing to put to use. Its first decision is which exceptions reach the leadership meeting. Finance managers own it, analysts maintain it and operations heads act on it. After its first cycle, revisit the driver assumptions and the commentary style to see which explanations actually changed a decision.