JUPITER PRIME

Consulting • Training • Advisory

جوبيتر برايم للاستشارات والتدريب

COURSE BROCHURE

Strategic Financial Leadership and Capital Allocation Training Course

21 – 25 March 2027
Online

jupiterprime.uk

info@jupiterprime.uk

Registered in the United Kingdom and Saudi Arabia

Strategic Financial Leadership and Capital Allocation Training Course

Ref: 2129_78519 **Date:** 21 – 25 March 2027 **Location:** Online **Fees:** 1900 GBP

Strategic Financial Leadership and Capital Allocation is a 1-week training course for finance managers moving into senior finance roles, in which each participant builds a Finance Leadership Agenda for their own function. Boards now expect finance leaders to shape strategy, ration capital and redesign how finance works. Jupiter Prime Training offers this course for leaders ready to take that seat.

Why Strategic Financial Leadership and Capital Allocation Matters Now

Three pressures shape the senior finance seat today: investors who judge management on returns above the cost of capital, operating units competing for a limited investment budget, and automation that is changing which finance tasks people still perform. An organisation whose finance leaders link every investment to strategy builds lasting value; one that spreads capital evenly across units funds yesterday's priorities and starves growth. The course rests on established models such as Economic Value Added EVA, the Weighted Average Cost of Capital WACC and the Balanced Scorecard BSC.

Who Gains Most from Strategic Financial Leadership and Capital Allocation

- Leaders responsible for shaping the investment budget and ranking capital requests across business units
- Managers who own planning, forecasting and the link between financial targets and corporate strategy
- Controllership heads preparing to oversee a wider finance function
- Treasury and funding leads who advise on capital structure and liquidity headroom
- Finance business partners expected to challenge operating plans with executive committees

Finance leadership teams that send several members together gain most, because they leave with a shared language for capital decisions.

Strategic Financial Leadership and Capital Allocation Capabilities

Participants practise turning corporate ambition into funding choices, operating models and a finance team able to deliver them.

- Align financial targets and hurdle rates with the stated corporate strategy — executive committee
- Weigh competing investment proposals using return, risk and strategic fit — capital committee
- Design a finance operating model balancing control, partnering and shared services — chief financial officer
- Assess capital structure options and their effect on funding resilience — board and lenders

- Communicate capital allocation decisions and trade-offs to non-finance leaders — business unit heads
- Build a change roadmap that develops finance talent and capabilities — finance team

Key Strategic Financial Leadership and Capital Allocation Terms

- Capital Allocation — the process of deciding which units, projects and acquisitions receive limited investment funds.
- Hurdle Rate — the minimum expected return a proposal must exceed before it qualifies for funding.
- Economic Value Added EVA — operating profit after tax minus a charge for all the capital employed to earn it.
- Weighted Average Cost of Capital WACC — the blended return required by lenders and shareholders.
- Finance Operating Model — the design of how finance work is split between business partners, centres of expertise and transactional services.
- Portfolio Rebalancing — shifting capital away from low-return activities towards those with stronger strategic and financial prospects.

Strategic Financial Leadership and Capital Allocation Day by Day

Day 1: The Senior Finance Leader's Mandate

- Evolving Role of the Finance Leader — Steward, Operator, Strategist or Catalyst
- Corporate Strategy Map — Translating Ambition Into Financial Targets
- Value Driver Tree — Linking Operational Levers to Shareholder Value
- Stakeholder Expectations Grid — Board, Investors, Lenders and Business Units
- Finance Leadership Self-Assessment — Gaps Between Current and Required Role

Day 2: Cost of Capital and Value Creation

- WACC Estimation — Setting Hurdle Rates for Different Business Risks
- EVA and Return on Invested Capital — Judging Unit Performance Fairly
- Capital Structure Choices — Debt Capacity Versus Funding Flexibility
- Dividend and Buyback Policy — Returning Surplus Cash to Shareholders
- Liquidity Headroom Planning — Protecting Strategy Through Downturns

Day 3: Capital Allocation Decisions

- Investment Appraisal Beyond NPV — Real Options and Strategic Fit
- Capital Rationing Scorecard — Ranking Proposals Across Competing Units
- Portfolio Rebalancing — Exit, Fix, Grow or Hold Decisions
- Acquisition Screening — Synergy Tests Before Committing Capital
- Post-Investment Audit — Learning From Approved Project Outcomes

Day 4: Designing and Leading the Finance Function

- Finance Operating Model Options — Partnering, Expertise Centres and Shared Services
- Balanced Scorecard for Finance — Measuring Function Contribution Beyond Cost
- Automation and Analytics Roadmap — Redeploying Finance Capacity to Insight
- Finance Talent Architecture — Succession, Skills and Career Paths
- Leading Finance Teams Through Change — Resistance, Sponsorship and Pace

Day 5: Practising the Finance Leadership Agenda

- Capital Committee Simulation — Defending an Allocation Under Executive Challenge
- Board Paper Drafting — Framing Capital Trade-Offs for Directors
- Operating Model Redesign Case — Manufacturing and Healthcare Finance Teams
- Peer Challenge Panel — Testing Targets, Hurdle Rates and Roadmaps
- Finance Leadership Agenda — Priorities, Capital Choices and Change Milestones

Applying Strategic Financial Leadership and Capital Allocation After the Course

- Run a capital rationing scorecard review of the current investment pipeline.
- Map the finance function against the operating model options and agree three redesign priorities with the finance leadership team.

Strategic Financial Leadership and Capital Allocation Questions FAQ

What is strategic financial leadership and capital allocation, and why does it matter now?

It is the senior finance discipline of steering strategy through funding choices and finance function design. It matters now because investors judge returns above the cost of capital, units compete for limited budgets and automation is reshaping finance work.

Which roles gain most from strategic financial leadership and capital allocation?

Finance managers stepping into senior roles gain most. Planning leads, controllers, treasury leads and finance business partners who advise executives on investment and funding benefit directly.

How does strategic financial leadership and capital allocation differ from a corporate finance valuation course?

It focuses on leadership decisions rather than valuation technique. A valuation course teaches how to price a business or project; here you use those results to ration capital, redesign the finance function and lead your team through change.

What do you bring back from strategic financial leadership and capital allocation?

You bring back a written agenda for your finance function. It sets out priorities, the capital choices you will champion, operating model changes and team development milestones.

Strategic Financial Leadership and Capital Allocation: The Way Forward

The Finance Leadership Agenda first informs which investment proposals the finance leader backs at the next capital committee. The chief financial officer and business unit heads use it to align funding and change priorities. After its first use, the hurdle rates and operating model choices deserve a second look against actual project returns and team capacity.