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COURSE BROCHURE

Value Creation Planning and Value Driver Analysis Training Course

4 – 8 July 2027
Dubai

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Registered in the United Kingdom and Saudi Arabia

Value Creation Planning and Value Driver Analysis Training Course

Ref: 2154_79406 **Date:** 4 – 8 July 2027 **Location:** Dubai **Fees:** 4600 GBP

Value Creation Planning and Value Driver Analysis is a 1-week training course for finance and strategy staff who assess shareholder value and prepare a business unit value creation plan backed by a value driver tree. Boards now expect every unit to show how its growth, margins and capital needs move economic profit, not only reported earnings. Jupiter Prime Training runs this course for staff who turn that into board choices.

Why Value Creation Planning and Value Driver Analysis Matters Now

Three forces push the subject up the agenda. Investors and lenders compare companies on return on invested capital ROIC against the cost of capital. Boards want each initiative tied to a measurable driver, and operating leaders need targets they can influence. The course rests on economic profit and value driver tree logic. A unit that maps its drivers well funds the right initiatives; one that does not spreads capital thinly and finds the shortfall late.

Who Gains Most from Value Creation Planning and Value Driver Analysis

- Staff who prepare unit strategy papers and initiative cases
- Analysts who model unit economics
- Staff who translate group value targets into unit operating measures
- Finance partners who challenge growth, pricing and cost proposals
- Staff who track initiative delivery and report value captured

A unit finance team and its strategy counterparts gain most when they attend together.

Value Creation Planning and Value Driver Analysis Capabilities

Participants move from reported unit results to the levers behind them, then to initiatives a board can fund.

- Calculate economic profit and ROIC for a business unit — capital hurdle discussions with the board
- Build a value driver tree linking operating levers to economic profit — unit target setting
- Weigh initiatives by value at stake, effort and timing — the funding sequence
- Test the sensitivity of unit value to growth, margin and capital assumptions — risk appetite
- Design lead indicators for each initiative — operating leaders and initiative owners
- Communicate a value creation plan in board language — directors and investors

Key Value Creation Planning and Value Driver Analysis Terms

- Economic profit — net operating profit after tax minus a charge for the capital invested.
- Return on invested capital ROIC — operating profit after tax divided by the capital tied up in operations.
- Value driver tree — a diagram that breaks economic profit into the operating and capital levers that move it.
- Value at stake — the estimated change in economic profit if an initiative delivers its targeted driver movement.
- Capital intensity — the amount of fixed assets and working capital needed to support each unit of revenue.
- Value creation plan — a sequenced set of funded initiatives, each tied to drivers, owners and milestones.

Value Creation Planning and Value Driver Analysis Day by Day

Day 1: Where Unit Value Comes From

- Economic Profit Versus Reported Earnings — Which Units Truly Earn Their Capital
- ROIC and Cost of Capital Spread — Growth Versus Return Trade-Offs
- Unit Invested Capital Build-Up — Allocation of Shared Assets and Working Capital
- Historical Value Bridge — Explaining Past Shifts in Unit Economic Profit
- Peer Return Benchmarks — Setting a Credible Ambition for the Unit

Day 2: Mapping the Value Drivers

- Value Driver Tree Construction — Linking Revenue, Margin and Capital Levers
- Operational Driver Definitions — Volume, Price Realisation, Yield and Cycle Time
- Capital Driver Mapping — Inventory Days, Receivable Days and Asset Turnover
- Driver Sensitivity Ranking — Focusing Effort on the Levers That Matter
- Controllability Assessment — Which Drivers Each Manager Can Influence

Day 3: Shaping Value Creation Initiatives

- Initiative Long List From Driver Gaps — Sources of Improvement Ideas
- Value at Stake Estimation — Sizing the Economic Profit Each Initiative Moves
- Effort, Risk and Timing Matrix — Ranking Initiatives for Funding
- Growth Versus Efficiency Initiatives — Balancing the Unit Portfolio
- Divestment and Exit Options — Releasing Capital From Low-Return Activities

Day 4: Steering Value Delivery

- Lead and Lag Indicator Design — Early Signals of Initiative Progress
- Unit Target Cascade From Driver Tree — Operating Targets Managers Own
- Value Tracking Dashboard — Captured Versus Planned Economic Profit
- Scenario Testing of Unit Value — Downside Cases and Trigger Points
- Incentive Alignment With Value Drivers — Rewarding Return as Well as Growth

Day 5: Practising the Business Unit Value Creation Plan

- Applying Economic Profit Diagnosis to a Case Unit — Baseline Agreement
- Applying the Driver Tree to Case Data — Lever Priorities
- Applying Initiative Ranking to the Case Portfolio — Funding Sequence
- Board Narrative and Value Storyline — Securing Director Support
- Completing the Business Unit Value Creation Plan — Owners, Milestones and Indicators

Applying Value Creation Planning and Value Driver Analysis After the Course

- Lead a session with unit managers to build and agree the first value driver tree for their unit.
- Prepare an economic profit baseline and value at stake estimate for the three largest initiatives in the current unit plan.

Value Creation Planning and Value Driver Analysis Questions FAQ

What is value creation planning and value driver analysis, and why does it matter now?

It is the discipline of linking a unit's operating levers to economic profit and turning them into funded initiatives. It matters now because boards and investors judge units on returns above the cost of capital, not on growth alone.

Which roles gain most from value creation planning and value driver analysis?

Finance and strategy staff who prepare unit plans gain most. Analysts, finance partners and initiative trackers in sectors from manufacturing to healthcare services use the driver tree daily.

How does value creation planning and value driver analysis differ from a management accounting course?

It works at unit strategy level rather than cost and budget control. Management accounting refines costing and internal reporting; this subject sizes initiatives by value at stake for the board.

What do you bring back from value creation planning and value driver analysis?

You bring back a draft plan for a case unit, with an economic profit baseline, a driver tree, a ranked initiative list and lead indicators.

Value Creation Planning and Value Driver Analysis: The Way Forward

The business unit value creation plan first informs which initiatives receive funding. Unit heads, finance partners and the executive committee use it to agree targets and track captured value. After its first cycle, revisit the driver tree, replacing weak levers and adding capital drivers as the unit's activities change.