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COURSE BROCHURE

# Chief Executive Finance, Culture and Change Toolkit Training Course

12 – 16 July 2027
Rome

# Chief Executive Finance, Culture and Change Toolkit Training Course

**Ref:** 2361_88528 **Date:** 12 – 16 July 2027 **Location:** Rome **Fees:** 6200 GBP

Chief Executive Finance, Culture and Change Toolkit is a 1-week training course for chief executives, general managers and business unit heads who must link strategic choices to financial results and to the behaviour of their people; it produces a chief executive priorities and capital agenda. Boards now judge leaders on cash, returns and culture at once. Jupiter Prime Training offers this course on the chief executive finance, culture and change toolkit.

## Why Chief Executive Finance, Culture and Change Toolkit Matters Now

Three groups press on the person at the top today: boards and investors who ask how each strategic bet earns back its capital, lenders who watch cash and covenants, and employees whose behaviour decides whether a change sticks. A leader who reads the monthly finance pack fluently, ranks initiatives by return and sets the cultural tone can redirect money and attention quickly; neglect on either side surfaces late as missed targets and departures. The course joins accounts reading, capital allocation and change leadership into one routine.

## Who Gains Most from Chief Executive Finance, Culture and Change Toolkit

- Leaders who own the profit and loss of a whole company or division
- Leaders who decide where capital and headcount go across competing initiatives
- Leaders who present results and strategy to boards, owners or investors
- Leaders who sponsor restructuring or mergers

An executive committee gains most when the chief executive and two or three direct reports attend together, because priorities and capital choices are then agreed in one language.

## Chief Executive Finance, Culture and Change Toolkit Capabilities

Participants read the numbers behind their strategy, direct capital and shape the behaviours that carry change.

- Assess the finance pack for margin, cash and balance sheet warning signs — the monthly executive meeting
- Weigh competing initiatives by return on capital, payback and strategic fit — the capital allocation decision
- Align operating targets and incentives with the cultural behaviours the strategy needs — the leadership team
- Design a change roadmap with sponsors, milestones and resistance points — the transformation office
- Communicate results, risks and capital requests clearly to the board — board and investor confidence
- Build a personal dashboard of financial and cultural indicators — the chief executive's weekly review

## Key Chief Executive Finance, Culture and Change Toolkit Terms

- Return on capital employed — operating profit divided by the capital tied up in the business.
- Free cash flow — cash left after operating costs and capital spending, available for debt, dividends or growth.
- Capital allocation — the choice of where to invest, divest or return money among competing uses.
- Operating leverage — the degree to which profit swings with sales because of a high share of fixed costs.
- Culture map — a description of the routines, symbols, power structures and stories that make up an organisation's culture.
- Change sponsor — the senior leader who owns a change, provides resources and removes obstacles to it.

## Chief Executive Finance, Culture and Change Toolkit Day by Day

### Day 1: The Chief Executive's View of the Numbers

- Income Statement, Balance Sheet and Cash Flow Links — Reading the Whole Picture
- Monthly Finance Pack Walkthrough — Questions to Ask the Finance Director
- Margin and Cost Structure Analysis — Pricing and Cost Priorities
- Working Capital and Cash Conversion — Liquidity Warning Signs
- Debt, Covenants and Funding Headroom — Lender Conversations

### Day 2: Strategy Choices and Capital Allocation

- Strategic Options Screening — Where to Compete and Where to Exit
- Return on Capital and Payback Comparison — Ranking Initiatives
- Investment Case Challenge — Testing Assumptions Behind Proposals
- Portfolio Review of Business Units — Grow, Fix or Divest Decisions
- Capital Budget Envelope — Balancing Growth, Maintenance and Returns

### Day 3: Culture as an Operating Asset

- Culture Map Diagnosis — Routines, Symbols and Power Structures
- Values and Behaviour Indicators — Linking Culture to Performance
- Incentive and Target Design — Rewarding the Behaviours Strategy Needs
- Leadership Team Dynamics — Trust and Decision Speed at the Top
- Culture Risk Signals — Misconduct, Turnover and Silence

### Day 4: Leading Change Through the Organisation

- Change Readiness Assessment — Sequencing the Transformation
- Sponsor and Stakeholder Mapping — Securing Backing for Change
- Restructuring and Integration Economics — Cost and Benefit Timing
- Resistance Handling Conversations — Keeping Key People Engaged
- Board and Investor Communication — Presenting Results and Capital Requests

## Day 5: Practising the Chief Executive Agenda

- Retail Group Turnaround Case — Applying Day 1 to Falling Cash
- Manufacturing Capital Review — Applying Day 2 to Competing Plant Investments
- Hospital Culture Change Exercise — Applying Day 3 and Day 4 Together
- Personal Leadership Dashboard — Financial and Cultural Indicators
- Completed Chief Executive Priorities and Capital Agenda — Leadership Team Endorsement

## Applying Chief Executive Finance, Culture and Change Toolkit After the Course

- Walk through the next monthly finance pack with the finance director using the margin, cash and covenant questions
- Rank current initiatives by return on capital and cultural fit and present the result to the leadership team

## Chief Executive Finance, Culture and Change Toolkit Questions FAQ

### What is the chief executive finance, culture and change toolkit?

It is a set of methods that lets the leader of a business read its finances, allocate capital and lead culture and change together. It matters now because boards judge leaders on returns and culture at the same time.

### Who gains most from the chief executive finance, culture and change toolkit?

Chief executives, general managers and business unit heads gain most.

### How does the chief executive finance, culture and change toolkit differ from a finance for non-finance managers course?

It works at the level of the whole business, joining capital allocation, culture and board communication, while a non-finance course explains accounts to line managers.

### What do you bring back from chief executive finance, culture and change toolkit training?

You bring back a chief executive priorities and capital agenda that sets out ranked initiatives, capital envelopes, cultural indicators and change milestones.

## Chief Executive Finance, Culture and Change Toolkit: The Way Forward

The chief executive priorities and capital agenda first informs which initiatives receive capital in the next planning round. The chief executive uses it with the leadership team, the finance director tracks it in the monthly pack and the board sees it in strategy sessions. After the first quarter, the cultural indicators deserve revisiting, because behaviour change shows up later than financial results.