DIPLOMA IN
STRATEGIC FINANCE & BUSINESS ANALYTICS

Become a Finance Business Partner

www.charteredaccountants.ie/diplomas
We will help you develop the critical skills required to start your career as a finance business partner. You will use and understand the potential of big and small data to drive business growth. Diagnose your firm’s strategic position and recommend appropriate responses. Become more commercially aware and learn leadership, presentation, and influencing skills to win over key stakeholders while keeping the highest ethical standards.

Who is it for?
The course develops finance professionals into Finance Business Partners – one of the fastest growing, most dynamic roles in finance today.

Why should you study this course?
You will become better positioned to understand and unlock the potential of your organisation’s existing data sources and how to leverage new exciting ones.

What will my input be?
Participants consistently tell us that they spend on average 20 hours per module (whether by classroom or distance learning) and approximately a further 20 hours per assignment. It should be noted that this is an average and a guideline.

Content overview
The course blends technical expertise, with leadership skills. Content includes:

- Strategic corporate finance;
- Effective communication and presentation skills;
- Strategy analysis and costing;
- Budgeting and strategic planning;
- Influencing and persuading key people;
- Big and small data analytics;
- MBTI (personality) assessment.
The programme draws on a wide range of examples, practice and theory and as such is internationally applicable.

**When?**

Modules take place on

Fridays - 2pm to 7pm

Saturdays - 9am to 2pm

**Programme schedule**

<table>
<thead>
<tr>
<th>Module</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1 &amp; 2 March</td>
</tr>
<tr>
<td>2</td>
<td>22 &amp; 23 March</td>
</tr>
<tr>
<td>3</td>
<td>12 &amp; 13 April</td>
</tr>
<tr>
<td>4</td>
<td>17 &amp; 18 May</td>
</tr>
<tr>
<td>5</td>
<td>14 &amp; 15 June</td>
</tr>
<tr>
<td>6</td>
<td>28 &amp; 29 June</td>
</tr>
</tbody>
</table>

**Class format**

The course is available by classroom or distance learning:

**Classroom**

The programme is delivered over a series of 6, two day modules.

Classes take place in Chartered Accountants Ireland, Dublin office.

**Distance learning**

The course content for the distance course is the same as the classroom. Distance participants will receive online access to all classroom material and recordings.

Classroom sessions are recorded live and made available at least two days after the classroom session. Recorded lectures are deemed as a supplementary learning resource and not a primary resource in order to complete a programme. All efforts are made to upload recorded material, where this is not possible due to technical errors or where there are time delays incurred, this is not deemed as prohibitive to completing an assessment.

**Course Price**

**Classroom**

CAI/ICAS member €3,365

Other professionals €3,735

**Distance Course**

CAI/ICAS member €2,695

Other professionals €2,995

Multiple bookings by a single employer will qualify for a discount of 10% for the second and subsequent booking. If you completed a Diploma with Chartered Accountants Ireland previously, you qualify for a discount of 10% off the Diploma in Strategic Finance and Business Analytics.

**Can I use the course towards my CPD hours?**

This programme offers structured and unstructured CPD time. The exact number of hours that can be claimed as CPD will vary for each individual depending on time expended and the requirements of their professional body.

**Entry Criteria**

This programme has been designed to meet the needs of business and finance professionals and is open to Members of Chartered Accountants Ireland and other recognised professional bodies including ICAS, ACCA, CIMA, CPA, ICAEW. Holders of a degree at Level 8 (on the NFQ) or equivalent qualification or experience in finance, business or other relevant field may also apply.

Applicants other than members of Chartered Accountants Ireland must provide proof of their membership or details of another professional body or details showing how their experience or qualifications are relevant. See our website for full details on eligibility rules.

**Assessment and awards**

To complete the programme, you will complete two practical home assignments and deliver a final presentation based on the second of these that you will deliver to examiners in person or online, including questions from the panel. Assignments will be released after module 3 and module 6.

These assignments will simulate typical pieces of work conducted by finance business partners, requiring participants to demonstrate their technical competence and capability to use the core business skills, such as influencing and stakeholder management.

You will also be required to complete learning logs where you will be asked to show how your thought process has developed and how your approach will change as a result.

**Final assessment**

- 10%, Over 3 learning logs
- 30%, Home assignment 1
- 40%, Home assignment 2
- 20%, Final presentation

Participants must achieve 50% or above in each of the home assignments to be eligible for the award of the Diploma. The overall pass mark is set at 50% with distinction achieved at 70%.
## MODULE 1
**Introduction, strategic corporate finance & effective communication**

Having completed this module it is intended you will be able to:

- Appreciate the distinctions between equity value and enterprise value;
- Be aware of issues around financial and operation leverage, corporate cash flows and cost of capital;
- Understand the Capital Asset Pricing Model;
- Understand and apply the main methods used to value a firm.

**Leadership skills**

- Understanding different personality types;
- Individual personality assessment (MBTI);
- Impact of your work style;
- Communicating effectively with different types of people;
- Adapting your approach in order to get results;
- Asserting yourself without upsetting others;
- Managing ambiguity and change.

## MODULE 2
**Strategy analysis, costing & cost accounting**

Having completed this module it is intended you will be able to:

- Understand corporate strategy;
- Appreciate key elements of industry and corporate analyses;
- Be aware of factors driving competition in an industry;
- Know the key elements of environmental and internal analyses and be able to apply them;
- Appreciate key generic corporate strategies open to firms;
- Understand the value chain and how it relates to a firm’s competitive positioning.

**Leadership skills**

- Building your influencing toolkit - getting buy in;
- 4 step influencing model;
- The psychology of persuasion;
- Influencing practice & feedback.

## MODULE 3
**Budgeting, strategic planning, influencing key people**

Having completed this module it is intended you will be able to:

- Understand the scope and challenges of financial planning and budgeting;
- Learn techniques to improve capital expenditure evaluation and control;
- Be able to generate improvements in your firm’s C2R (close to report) cycle;
- Understand and apply key aspects of the Balanced Scorecard to your own firm;
- Be able to apply benchmarking to evaluate your firm’s cost structure and to identify scope for improvement.

**Leadership skills**

- Building your influencing toolkit - getting buy in;
- 4 step influencing model;
- The psychology of persuasion;
- Influencing practice & feedback.
Having completed this module it is intended you will be able to:

• Understand the importance of corporate structure and its impact on strategy;
• Understand the distinctions between business restructuring and cost reduction and financial restructuring;
• Appreciate the role of value creation and Return on Capital Employed in assessing whether a business is performing adequately;
• Understand options facing management of an underperforming business unit;
• Know major cost cutting methods;
• Understand the main steps of financial restructuring and the legal avenues available to distressed firms;
• Be familiar with examples of corporate restructuring and their key features.

Having completed this module it is intended you will be able to:

• Design remuneration systems in line with strategic objectives;
• Understand supply chain analysis, outsourcing and the make/buy decision;
• Know how to reorganise to really cut costs;
• Understand joint ventures and strategic partnerships;
• Know how to win over key stakeholders;
• Build your team and their capabilities.

Having completed this module it is intended you will be able to:

• Understand key concepts of analytics: from descriptive to predictive;
• Have an awareness of data scientists: who they are, what they do, why do we need them;
• Appreciate the balance of art and science in decision making using data;
• Manage your company, unit or team with real-time analytics;
• Compare big vs small data approach to data analysis;
• Use predictive modelling techniques;
• Explore supply chain and marketing analytics.
The course is led by a number of well-respected finance professionals and industry leaders. These include:

**Cormac Lucey**
Financial Services Consultant

Cormac is a well-known and respected economic commentator and contributor to TV and Radio and is a columnist with the Sunday Times. Cormac holds an MBS from UCD and is a qualified Chartered Accountant. He was formerly Vice-President, Rabobank International Acquisition Finance and finance director of an AIM quoted company, Stentor plc. Cormac has been a consultant on acquisition and disposals for a number of quoted Irish companies and is currently director of the IMI Business Finance programme, and lectures on many programmes with Chartered Accountants Ireland.

**Danica Murphy**
Founder and Director
Prism Leadership & Change Consulting

A psychology graduate from the University of California Santa Barbara, Danica went on to achieve her accountancy qualification with Arthur Andersen in San Francisco. Her deep understanding of the interdependency between business practice and human psychology led her to establish PRISM over 20 years ago. She is a highly regarded executive coach and business consultant both in Ireland and internationally.

Danica has co-authored books and training resources to contributes to a variety of training and business publications. Danica is a member of the Institute of Directors of Ireland, the Irish Institute for Training and Development and the Association for Coaching.

**Rose O’Sullivan**
Finance Business Partner, FEXCO

*My experience on the course*

The course content was excellent. The communications part of the course was amazing. Nobody teaches you how to present a report to the MD of a company, and convince them that your solution is the best. During the course, I got to learn these skills and they are invaluable to me.

*The aftermath: my promotion*

The skills that I developed on the course resulted in my role being expanded as I took on additional responsibilities. I love my new job and couldn't be happier.
APPLICATION FORM

DIPLOMA IN STRATEGIC FINANCE

This form should be completed and returned to
Linda McGee, Learning & Development, Chartered Accountants Ireland, Chartered Accountants House, 47-49 Pearse Street, Dublin 2.
Telephone: + 353 (1) 637 7213   Fax: + 353 (1) 523 3987   Email: bookings@charteredaccountants.ie

---

**Section 1 – Personal Details**

(Please note the details you provide in this section will be then used as your correspondence address throughout the course)

- **Name**
- **Address for Correspondence**
- **Contact Telephone Number**
- **Contact Email address**
- **Chartered Accountants Ireland or ICAS membership number**
- **Other professionals, please state your relevant qualification (e.g. ACCA, CIMA etc)**

*In the case of other professionals, proof of membership will be required from the participant’s own member body.*

**Section 2 – Employment Details**

- **Company Name**
- **Job Title**
- **Company Address**
- **Company Phone number**
- **Company Email**

If you do not wish for your name and company to be included on the participant list circulated to the class tick here ☐

**Section 3 – Payment Details**

**Is your company paying your qualification fees?**  ☐ No  ☑ Yes (if yes we will raise the invoice against the company details provided in section 2)

**Classroom:**
- CAI/ICAS member fee: €3,365
- Other professionals fee: €3,735

**Distance:**
- CAI/ICAS member fee: €2,695
- Other professionals fee: €2,995

**Credit Card** □  **Debit Card** □  **Instalments** □

**The instalment payment option will allow participants to spread the cost of your diploma over four equal payments, with the first payment being charged at registration stage, and then remaining payments being charged to a debit/credit card on agreed dates.**

If paying by card please fill out the below:

- **Card Number**
- **Expiry date**
- **CCV**
- **Signature of Cardholder**

**For a full list of terms and conditions please visit our site** [www.charteredaccountants.ie/diplomas](http://www.charteredaccountants.ie/diplomas)

Please tick the box to indicate that you’ve read the terms and conditions ☐

Use and protection of your personal information.

The Institute will use the information which you have provided in this form to respond to your request or process your transaction and will hold and protect it in accordance with the Institute’s privacy statement which explains your rights in relation to your personal data.