

Workshop on

“Financial Planning & Analysis”

3-Day On-Site Program

About Us

We are the training providers and deals in Technical, HSEQ, Management and Soft Skills Training.

We have highly knowledgeable and experienced local & foreign subject matter experts. Our team is highly focused and provides the best support as per your requirements and needs. We provide a platform from where you can add value in you teams. We are highly fascinated on the development of your Technical and Management Teams.

We can provide on-site and classroom training.

About Trainer

The Trainer has around 20years of experience in risk management, compliance and loan processing and approvals while working for a DFI, investment bank, leasing companies and micro finance bank.

He is a skilled at formulating and implementing internal controls, identify, assess and recommend mitigating measures to minimize risks, analyze data, prepare business plans and strategies and undertake effective correspondence.

Prepared and got approved by the Board the Credit policy, Restructuring & Rescheduling policy, AML/CFT policy, Pricing policy,

Internal Controls Policy, Operational Risk Policy, Conduct Assessment Framework and Compliance Policy. In addition, have prepared and got approved from the management Operational Manual, Credit Procedure, Compliance Procedure.

He has retired as Head of Compliance at Pak Oman Microfinance Bank Limited. Prior to this, have worked at Alkhodari A.M Sons Co Dammam, Saudi Arabia as a Risk Analyst, at Standard Chartered Leasing Limited as Head Credit & Risk Management, at SME Leasing Limited as Head Internal Audit, at Security Paper Mills Ltd as Project Finance Manager and at Bankers Equity, IDBP and Hino Pak Motors Ltd as Project Manager and Executive Production.

He has earned MBA from IBA, B.E from NED and MSc from University of Sussex, UK. He has also possess Banking diploma (DAIBP) and CIA certification.

Training Content:

Financial Planning & Analysis (FP&A)

- ✓ Elaborate FP&A
- ✓ Basic steps in the FP&A process
- ✓ Modern technologies for FP&A
- ✓ Financial Planning - Definition, Objectives and Importance
- ✓ Financial forecasting
- ✓ Business budget
- ✓ How to determine financial health of a company
- ✓ Important roles of FP&A
- ✓ FAQs on FP&A
- ✓ Written test (MCQs)

A/P Planning & Organizing Practices

- ✓ Elaborate A/P
- ✓ Functions of A/P
- ✓ Major objective of managing A/P
- ✓ Best practices of A/P
- ✓ What are the most common A/P problems
- ✓ Major types of internal controls in A/P
- ✓ FAQs on A/P
- ✓ Written test (MCQs)

Budget Preparation and Analysis

- ✓ Elaborate the process
- ✓ Why is the budget preparation important
- ✓ Types of budget

- ✓ How is a budget prepared
- ✓ How is a budget managed
- ✓ Qualities of a good budget
- ✓ How is a budget analysis performed
- ✓ Written test (MCQs)

Financial Assessment

- ✓ What is financial assessment
- ✓ How is the financial assessment made
- ✓ Factors impacting the assessment
- ✓ An example of weekly charge
- ✓ Written test (MCQs)

Risk

- ✓ Elaborate risk
- ✓ Risk assessment
- ✓ Risk evaluation
- ✓ Risk mitigation
- ✓ Examples of risk management
- ✓ Written test (MCQs)

Financial Root Cause Analysis & Problem Solving

- ✓ What is root cause analysis
- ✓ Basic causes
- ✓ The root cause analysis process
- ✓ 5-Whys
- ✓ Impact analysis
- ✓ Kaizen technique
- ✓ Effective root cause analysis
- ✓ Written test (MCQs)



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