
FP&A Performance Analytics and Board Dashboards Training Course

26 – 30 July 2027
Cape town





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Programme Summary

FP&A performance analytics and board dashboards is a five-day training course for senior finance leaders at strategic level, culminating in a finance analytics and board reporting blueprint for their organisation. Many finance functions hold rich ledger and ERP data yet still produce static budgets and board packs that describe the past rather than explain it. The approach connects a governed finance data model to driver-based planning, rolling forecasts and dashboards designed to a recognised reporting notation. Mars Training Centre UK delivers this programme in FP&A performance analytics and board dashboards.

The Business Case

Boards and executive committees expect finance to explain why results moved and what is likely to happen next, not only to report what was booked. When planning rests on drivers and dashboards follow a consistent design standard, finance spends less time reconciling numbers and more time advising on decisions, and the organisation responds to change faster and with greater credibility.

- Forecast Accuracy and Agility: Improve as driver models and rolling forecasts replace static budgets.
- Reporting Cycle Time: Shortens when one governed data model feeds every report.
- Decision Quality at Board Level: Rises when variance insight is presented consistently.

Principles and Evidence Base

- Driver-Based Planning: Links financial outcomes to operational volumes, prices and rates in Session 2.
- Rolling Forecasts: Replace fixed-horizon budgets with a continuously extended outlook in Session 3.
- AFP FP&A Guidance on Budgeting and Financial Reports: Inform planning process and management report content in Sessions 3 and 4.
- IBCS International Business Communication Standards: Provide the notation for income statements, variance charts and board dashboards in Session 4.

Intended Participants

- Leaders accountable for the plan, forecast and performance reporting of an organisation.
- Heads of planning functions who design models and reporting cycles.
- Senior controllers responsible for ledger data quality.
- Finance executives who present results and outlooks to boards and executive committees.
- Directors sponsoring planning systems or business intelligence investment.

The programme serves corporate groups, government entities, energy and utilities, and financial services organisations.



Learning Outcomes

1. Participants will be able to diagnose the maturity of their planning and reporting practice.
2. Participants will be able to construct a finance data model reconciling ledger and ERP sources.
3. Participants will be able to design driver-based models and a rolling forecast cycle.
4. Participants will be able to evaluate variance and profitability results.
5. Participants will be able to construct board dashboards and KPI sets using a recognised reporting notation.
6. Participants will be able to justify a governance and self-service model for finance analytics.

Programme Structure

Day 1: Finance Data Foundations for FP&A Performance Analytics

Is the finance data trusted, connected and fit for analysis?

- FP&A Maturity Diagnostic
- Chart of Accounts and Reporting Hierarchies
- ERP, Ledger and Operational Data Integration
- Star Schema Finance Data Models
- Data Quality Rules and Reconciliation Controls

Day 2: Driver-Based Models and Profitability

Which operational drivers explain financial results, and where is value made or lost?

- Driver Trees and Value Driver Mapping
- Volume, Price and Mix Analysis
- Customer, Product and Channel Profitability
- Activity-Based Cost Allocation
- Sensitivity Testing of Key Drivers

Day 3: Rolling Forecasts and Scenario Planning

How does finance produce a credible outlook that keeps pace with change?

- Rolling Forecast Horizon and Cadence Design
- Statistical and Predictive Forecasting Methods
- Scenario and What-If Modelling
- Forecast Accuracy and Bias Tracking
- Integrated Business Planning Calendar



Day 4: KPI Design and Board Dashboards

How is performance presented so that a board can act on it?

- KPI Selection, Definitions and Targets
- IBCS Notation for Variance and Income Statements
- Board Pack Narrative and Commentary Structure
- Power BI Dashboard Architecture for Finance
- Exception Reporting and Alert Thresholds

Day 5: Applying FP&A Analytics in Your Organisation

How are the models, forecasts and dashboards combined into one operating blueprint?

- Finance Analytics Governance and Data Ownership
- Self-Service Reporting Roles and Controls
- Roadmap for Planning and BI Platform Adoption
- Peer Review of Draft Board Dashboards
- Finance Analytics and Board Reporting Blueprint

Methodology

The programme is built around a data workshop. Participants work with sample ledger and ERP data for a multi-division organisation, building the finance data model, driver trees, a rolling forecast and a board dashboard in stages across the sessions. Each stage is then mapped onto the participant's own organisation and reviewed.

- Suggested activity: Building a driver tree for a utility's revenue and operating cost.
- Suggested activity: Redesigning a public-sector monthly finance report to IBCS notation.
- Suggested activity: Running a rolling forecast review with scenario adjustments for a manufacturing group.

Capstone Output

Each participant completes a finance analytics and board reporting blueprint. It contains a maturity diagnosis, a target finance data model, a driver map for the main business lines, a rolling forecast design, a board KPI set with dashboard mock-ups and a governance model, ready to present to the chief financial officer or audit committee.



Frequently Asked Questions

Is FP&A performance analytics suitable for finance leaders without data science experience?

Yes. It is designed for senior finance leaders. It assumes strong financial knowledge and spreadsheet familiarity, but no programming background; data modelling concepts are built up during the sessions.

Which frameworks underpin FP&A performance analytics and board dashboards?

It rests on driver-based planning, rolling forecasts, guidance from the Association for Financial Professionals on budgeting and financial reports, and IBCS International Business Communication Standards for dashboard and report design.

How is the FP&A performance analytics blueprint used at work?

You leave with a sequenced plan: the data model to build, drivers to forecast, board KPIs and dashboard layouts to adopt and governance roles to assign.

How does FP&A performance analytics differ from general business intelligence programmes?

General business intelligence programmes cover analytics across all functions. This course focuses on ledger data, driver-based planning, forecasting and board-level financial reporting.