



# Finance Analytics for Business Results

Every Tuesday and Thursday

January 26<sup>th</sup> Through February 11th 2021

## About the Training Course

The world economy today is continuously and rapidly changing. Globally, customer demands are becoming more dynamic and customers are looking for better quality products and services at a more affordable cost. Data-driven decision making has become the need of the hour for improved and optimized business efficiencies. According to Deloitte,

“As companies generate more and more data each day, finance teams have seemingly limitless opportunities to glean new insights and boost their value to the business. But if it were easy, everyone would do it. The problem is, the amount of data emanating daily from various sources can be overwhelming....

... Businesses need a practical way to collect, process, govern, and act upon reams of information.”

The **Finance Analytics for Business Results** is a **10-hour live, virtual, and practical** training delivered by Dr. Prashanth H Southeikal (profile below), Managing Principal of DBP-Institute. This training will equip participants with key finance analytics concepts and skills. Dr. Southeikal has trained over **1250 professionals the world over** in data and analytics for organizations such as SAS-Institute (Canada), Suncor Energy (Canada), General Electric (India), DataVersity (US), University of Calgary (UoC, Canada), IE Business School (Spain), SP-Jain School of Management (India), NTPC (India), Riversand Technologies (US), GAIL (India) and Plains Midstream (Canada).

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Finance Analytics for Business Results





## Learning Objectives

The way data is collected and used in finance means businesses are looking for **professionals who can understand, analyze, and use the data** for improved business performance.

*The CFO guide to data management strategy*, in Deloitte's Crunch time series notes, "New technologies can help you fix or work around many data problems without the need for large-scale investment and company-wide upheaval. Executives, as reported by Forbes, consider big data analytics a "disruptive and important technology, setting the foundation for long-term change management in their organizations."

In this backdrop, this training is designed for Finance Professionals and builds on one's technical and managerial competencies. Participants will learn real life examples on how data analytics can be applied to various areas of finance from accounting to finance to treasury operations. This training has a strong focus on the **application** of data and insights for finance **business performance**. This training has **3 key learning objectives**.

1. Understanding Data Analytics, Business Data and Business Systems in the context of Financial Management (FM)
2. Learning key strategies to acquire quality data for Data Analytics in FM
3. Applying Data Analytics techniques, deriving insights, interpreting the results, and communicating the insights derived to senior management and stakeholders.

## Instructor Profile



Dr. Prashanth H Southekal is the Managing Principal of **DBP-Institute**, a Data Analytics Consulting and Education company based in Calgary, Canada. He brings over 20 years of Information Management experience from companies such as SAP, Shell, Apple, P&G, SAS and General Electric.

In addition, he has trained over 1200 professionals world over in Analytics, Data Products, and Enterprise Performance Management (EPM). He sits on the Advisory board of SAS (Western Canada), Evalueserve (Switzerland) and Grihasoft (India). He is the author of 2 books - **Data for Business Performance** and **Analytics Best Practices**. and is an adjunct faculty of Data Analytics at the University of Calgary (Canada) and IE Business School (Spain). Dr. Southekal holds a **PhD** from ESC Lille (FR) and an **MBA** from Kellogg School of Management (US). In addition, he is **PMI-PMP**, **APICS-CPIM** and **Lean Six Sigma (LSS)** certified.





## Training Methodology

This training uses field-tested business analytics tools and techniques. The training material is constantly updated to match the latest trends and industry best practices as Dr. Southekal trains over 50 professionals every month. This training uses a variety of approaches including live lessons, classroom discussions, videos, group activities, pre-class readings, case studies, individual exercises, and guest speaker(s).

Participants with at least **60% attendance** will be awarded a **Certificate of Achievement** from **DBP-Institute, Canada** and **CFO.University** as evidence of the course mastery. Post training, Dr. Southekal is always available for any short discussion with the students via email, LinkedIn, phone, or video conferencing tools.

## References

“Absolutely phenomenal session, really excited to put my new learnings to use.”

**Chris Lambert, Vice President, Technology, Cortex Business Solutions, Canada**

“Dr. Southekal is the Salman Khan (of Khan Academy) when it comes to teaching Data Analytics - authentic, knowledgeable and cares for the students. This was one of the best-designed courses I have attended. There are so many analytics videos and articles out there, but none was giving me the complete picture.”

**Faysal Khan, Oil/Gas Process Engineer, Worley Parsons, Calgary, Canada**

“This is a great, concise presentation and an opportunity for CFO’s and others to learn more about data analytics and how it can improve the bottom line. Well done Prashanth H Southekal, PhD, MBA!”

**Max Lof Advisory Board Member, Iridium Risk Services, Canada**

“Great discussion, practical examples and tips Steve Rosvold and Prashanth H Southekal, PhD, MBA”

**Alois Nyamarebv, MSc Director – Chief Learning Officer, Data X-Academy, South Africa**

“Dr. Southekal's teaching style and approach is practical, and very easy to comprehend.”

**Ajit Joseph, Implementation Manager, Allianz, Toronto, Canada**





## References (Con't)

“This was an excellent class! Prashanth, thank you for the deep dive and providing us with a true start to finish picture of data analytics, you covered a ton of material and really gave us a holistic view.”

**Jason Boroos, Supervisor ONRR, Denver, USA**

“I highly recommend Dr. Southeikal's Data Analytics training to my network.”

**Lesley Le, Consultant, CGI, Winnipeg, Canada**

## Schedule and Logistics

- The training will run every Tuesday and Thursday from January 26<sup>th</sup> through February
- Time: 3:00-4:30 pm EST/AST  
2:00-3:30 pm CST  
1:00-2:30 pm MST  
Noon-1:30 pm PST  
8:00-9:30 pm GMT
- Each session will run approximately 1 ½ hours
- The training sessions will be delivered over **Zoom** and will open to **anyone** from **anywhere** in the **world**.
- This training is limited to **40 participants** on **first come** basis
- It is recommended that participants **download the daily Zoom recordings** to their PC/Cloud. A day's recording is about **850MB**.

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## Course Content

### Session 1: Introduction to Finance Analytics

- Introduction to Finance Analytics
- Competitive Advantage with Finance Analytics
- Finance Competencies for the next decade
- 5 Key drivers in Finance Analytics

### Session 2: Business Data and IT Systems

- The Finance Process - Business Data & IT Systems
- Data Lifecycle (DLC)
- Data Quality and Data Profiling

### Session 3: Descriptive Analytics – Part 1 (Exploratory Data Analytics)

- Measuring Finance Performance with Exploratory Data Analytics
- Measures of Central Tendency and Variation
- Exploratory Data Analytics in Excel
- Exercise on Data Quality (EDA)

### Session 4: Descriptive Analytics – Part 2 (Associative Data Analytics)

- Introduction to Associative Data Analytics
- Correlation and Apriori Techniques
- Strategic Data Acquisition for Analytics

### Session 5: Descriptive Analytics – Part 3 (Inferential Data Analytics)

- Fundamentals of Inferential Data Analytics in Excel
- Hypothesis Testing
- Inferential Data Analytics (T-Test, A/B Testing, & ANOVA)

### Session 6: Predictive Analytics

- Fundamentals of Predictive Analytics
- Regression Models for Finance Analytics
- Predictive Data Analytics in Excel
- Exercise on Multiple Linear Regression (MLR)

### Session 7: Essentials of Machine Learning

- Fundamentals of ML (Machine Learning)
- Key characteristics of ML Models
- Supervised & Unsupervised ML Algorithms in Finance Management
- Evaluating Analytics Models

### Session 8: Prescriptive Analytics

- Introduction to Prescriptive Analytics
- Applying Prescriptive Analytics Techniques for Optimal Results with Solver
- Times-series data and Fast Fourier Transform (FFT) Analysis in Finance

### Session 9: Data Products and Other Analytics Topic

- Data Products
- Text Analytics in Enterprises
- Good Finance Analytics v/s Bad Finance Analytics
- Finance Analytics Case Studies – Oil/Gas, Utilities, and Retail/CPG

### Session 10: Data Visualization & Wrap-up

- Dashboards & Reports in Finance
- Overview of Data Visualization
- Data Visualization principles of Edward Tufte
- 6 building blocks of Data Storytelling including Gestalt Principles
- Managing your careers in Finance Analytics
- Wrap-up

## Price

#	Feature	Feature
1	Live Finance Data Analytics course (10 Sessions) over Zoom	<b>Yes</b>
2	Recordings of the course in Zoom	<b>Yes</b>
3	Certificate of Achievement (Digital Badge) signed by Dr. Prashanth Southekal (for 75% attendance) and CFO.University	<b>Yes</b>
4	Slides in PDF format	<b>Yes</b>
5	25% discount code on Dr. Southekal's book – <i>Analytics Best Practices</i>	<b>Yes</b>
6	1-hour post Training consulting/advisory/Career-preparation with Dr. Southekal	<b>Yes</b>
7	One Month Membership at CFO.University	<b>YES</b>
	Price per person (not a Member Scholar at CFO.University)	USD \$599
	<b>Price per person (Member Scholars at CFO.University)</b>	<b>USD \$499</b>

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**BECOME A MEMBER**

**Finance Analytics for Business Results**