

The Finance Copilot

Transform your Finance Function into a value-generating unit, participating to the decision-making process

Despite the **strategic importance of the insights** developed by Finance Teams, its influence is limited. But **Finance Business Partnering** can help the company generate more value through



Efficient Reporting Stack



Business Acumen and Empathy



Partnering



Clear and Proactive Communication



Problem-solving and Consulting

This is why we developed **the Finance Copilot**, course that trains Finance professionals to improve their business skills and become a go-to resource so Finance becomes a profit center



Course overview

Part 1: Finance Business Partnering

FBP Framework
Role Plays and Practice

Part 2: Financial Storytelling

4-Step approach
Final Group Presentation



Targeted audience

FP&A/Controlling teams of more than 8 persons who want to

- **influence** business decisions
- craft a memorable message that generates **engagement** and **follow up actions**



Format

This course is given

- In person in 2 day on your premises (or any other)
 - Online via Zoom/Teams 7 workshops of 2 hours
- Recordings are distributed



Learning method

The course alternates **theory** and **interactivity** with

- Individual/group exercises
- Brainstorming sessions
- Quizzes
- Practice

Soufyan Hamid, the facilitator

Soufyan spent 17 years in FP&A and through his career, he developed a training method mixing the storytelling principles of TEDx talks and Toastmaster with the specificities of FP&A



The double sided approach (technical and behavioural skills) was interesting as we often focus on technical skills in Finance.

Exercises and role plays helped us assimilate the content and made it fun and interactive.

Tim Duyck
Director Financial & Business Controlling at TVH



The course was structured in a logical sequence [...]. The theoretical parts were alternating with practical ones, [...]. Soufyan did a great job walking us through this journey, adapting as we went. It was great to also receive actionable feedback following the last session [...]

Delia Pop
Financial Planning and Analysis Manager at Dance

Contact me to find out more

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What do we cover in this course?

The course is based on the growing expectations to get from us the following skills: **Collaboration, Problem-solving, and Communication.**

Day 1 - Finance Business Partnering

Finance

Rationalize and Automate Reporting
Forecast like a Pro

Business

Understand Business Needs
Translate Needs into Financials

Partner

Build Relationship and manage them
Use Influence and manage demands

Day 2 - Financial Storytelling

STEP 1

Prepare your message

STEP 2

Prepare your audience and story

STEP 3

Prepare your visuals

STEP 4

Prepare your presentation and deliver it

How do we facilitate?

DYNAMIC

Modern and engaging teaching style



Engagement on our training is of paramount importance. Our participants are adult professionals and don't have to go back to school in a boring classroom. We use modern techniques of engagement to make the sessions voluntarily active both in in-person as in digital courses

USE CASES

Practical setup of concepts reviewed



Real-life and tailored use cases are given to the participants to apply the learnings of the day. Laptops are needed to work on these practical exercises which foster collaboration

GAMES

Playing on challenge and competition



To test the participants' knowledge and develop a healthy competition, we propose a gamified experience. That way, not only will the learning be funnier but that will also offer a break in a topic that can sometimes be heavy

GROUPS

Developing a team spirit through the day



Team exercises and brainstorming sessions can be organized both in in-person training as well as in digital sessions (breakout rooms). This allows participants to help each other and use everyone's strengths.

What do they think

★★★★★

What I like most about the course in storytelling for finance is how it effectively integrates complex financial concepts with persuasive narrative techniques, making the content more accessible and memorable. I would definitely recommend this course to a friend, as I believe it offers a unique perspective on how to communicate financial ideas more impactfully. I have particularly appreciated learning how to structure and present financial information in a more captivating manner, which I believe I can apply in real-life professional situations to enhance my ability to influence and persuade. I'm from Mexico and the content, language, and method is really valuable.

 Emmanuel Mora
Controller

★★★★★

The one who wanted to improve presentation skills and **Soufyan's courses are highly recommended**. He is doing some great Job.

 Samir Das
Financial Director at The Organic Pharmacy

★★★★★

A well-structure, concise course. It gives a good mix of lecture and practice, in a **very supportive atmosphere**.

 Ilona Sisak
Deputy CEO at SIGNAL IDUNA

Deloitte.

SIGNAL IDUNA

HOLCIM

proximus

TVH

INTUIT

ADB SAFEGATE

Organize a session for your team and contact us

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 The Finance Circle
SKILLS BEYOND FINANCE