

CMA Part 1: Financial Reporting, Planning & Performance

Special Workshops
Cape Town (South Africa)
25 Aug - 11 Sep 2025

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CMA Part 1: Financial Reporting, Planning & Performance

Ref: 3331_138343 **Date:** 25 Aug - 11 Sep 2025 **Location:** Cape Town (South Africa) **Fees:** 8200 Euro

Course Description

This comprehensive 15-day course prepares candidates for the CMA Part 1 exam, focusing on Financial Reporting, Planning, Performance, and Analytics. Participants will gain in-depth knowledge of external financial reporting, budgeting techniques, performance management, cost management, internal controls, and technology applications in finance.

Learning Objectives

- Understand and apply principles of external financial reporting and GAAP/IFRS standards
- Develop proficiency in planning, budgeting, and forecasting techniques
- Master performance management tools and metrics for effective decision-making
- Gain expertise in cost management strategies and internal control systems
- Learn to leverage technology and analytics for financial analysis and reporting

Course Modules

Day 1: Introduction to Financial Reporting

- Overview of financial statements
- GAAP and IFRS frameworks
- Recognition and measurement principles
- Financial statement analysis basics

Day 2: Advanced Financial Reporting

- Consolidated financial statements
- Segment reporting
- Disclosure requirements
- Integrated reporting concepts

Day 3: Planning and Budgeting Fundamentals

- Strategic planning process
- Budgeting methodologies
- Forecasting techniques
- Annual profit planning

Day 4: Advanced Budgeting and Forecasting

A graphic of a chessboard with several chess pieces, including a king, queen, and pawns, arranged on it. The text 'UK Training PARTNER' is overlaid on the board.

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- Capital budgeting
- Cash flow projections
- Sensitivity analysis
- Rolling forecasts

Day 5: Performance Management Essentials

- Cost and variance analysis
- Flexible budgets
- Responsibility centers
- Transfer pricing

Day 6: Advanced Performance Management

- Balanced Scorecard
- Key Performance Indicators KPIs
- Return on Investment ROI analysis
- Economic Value Added EVA

Day 7: Cost Management Strategies

- Activity-Based Costing ABC
- Target costing
- Life-cycle costing
- Quality cost management

Day 8: Advanced Cost Management

- Lean accounting principles
- Theory of Constraints
- Supply chain cost management
- Environmental cost management

Day 9: Internal Controls Framework

- COSO framework
- Risk assessment techniques
- Control activities
- Monitoring procedures

Day 10: Advanced Internal Controls

- IT general controls
- Application controls
- Sarbanes-Oxley compliance
- Internal audit function

A graphic of a chessboard with several chess pieces (king, queen, rook, knight, and pawns) in gold and silver. The text 'UK Training PARTNER' is overlaid on the board.

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Day 11: Technology in Finance

- ERP systems
- Business intelligence tools
- Cloud computing in finance
- Cybersecurity for financial data

Day 12: Data Analytics in Finance

- Big data in financial analysis
- Predictive analytics
- Data visualization techniques
- Machine learning applications

Day 13: Emerging Topics in Financial Management

- Blockchain in finance
- Artificial Intelligence in accounting
- Robotic Process Automation RPA
- Sustainability reporting

Day 14: Case Studies and Practical Applications

- Financial reporting case studies
- Budgeting and forecasting exercises
- Performance management simulations
- Cost management scenarios

Day 15: Exam Preparation and Review

- Comprehensive review of key topics
- Exam-taking strategies
- Practice questions and mock exam
- Final Q&A session

Practical Wins for Participants

- Ability to prepare and analyze complex financial statements
- Proficiency in creating effective budgets and forecasts
- Skills to implement performance management systems
- Expertise in leveraging technology for financial analysis and reporting

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