

Modules

*Learn HOW TO
Transform in the
Digital Age and HOW
TO Implement
Advance Analytics*



Finance Analytics Institute™



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Module 1: Roadmap to Implement an Analytics Culture (\$299)

Building an analytics culture within an organization involves fostering an environment where data-driven decision-making is a priority and everyone understands the value analytics. We will start with the foundation, meaning discussing what **Transformation** is about in the new digital world.

Building an Analytics Culture starts with starts with a **Roadmap** for how to advance from a Trusted Scorekeeper in the back office to a Strategic Partner in the front line of the business. It outlines a journey for how an organization can leverage digital technologies to achieve its objectives and serves as a guide for implementing digital initiatives and transformations, helping ensure that investments align with broader business goals.



The investments should be focused around the four components of the Roadmap including Mindset, People, Processes and Systems, as when these are aligned a company can reach the highest level of Analytics Intelligence to guide decision making and the strategic direction of the company. Here's how to create an effective roadmap:

- 1) **Mindset** is the start button to build a analytics culture and is explored through the four personas of the Reporter, Commentator, Advisor and Strategist.
- 2) **People** is about having enough people but also the right people, meaning people with the skills, knowledge, and abilities to play an impactful role in the company.
- 3) **Processes** is at a high level about the leverage of data effectively to drive decision making but also include how to implement well-defined and written processes
- 4) **Systems** is about knowing the tool-stack to be able to move from a Reporter or Commentator who use Excel, ERP, Data Visualizations to an Advisor or Strategist, who impact the decision making in the company.

With the foundation of the four components in place, we will next exploit we will exploit a real use case of an organization who **fail to Implementing an Analytics Culture**.



Module 2: Systems & Storytelling for Data Driven Decisions (\$199)

Systems and storytelling are crucial in making data-driven decisions because they help turn raw data into actionable insights that influence decisions and foresight that set the strategic direction of the company.

In this course we start by exploring the ground breaking concept of **The Analytics Business Partner™** who in the new digital world operates as a strategic partner to the business using its strong hard skills but also its strong soft skillset to set the future agenda for the company.

Next we will explore the **System tool-stack** and dive into how AI-Enabled Analytics tools are able to make data insightful to guide unbiased decision making versus Data Visualization tools (PowerBI, Tableau, ...) that just make data informative, meaning telling biased information most often known by the business stakeholders.



With an understanding of these two foundational concepts we are ready to explore how to do compelling **storytelling** with data, starting with the ground rule of telling stories: 'Know your audiences', as we will explore how different stakeholders require different levels of detail and types of insights.

Along the journey towards the Analytics Business Partner™ it is important to understand where you are today and what gaps you have to your future aspiration. As such, you will learn the power of **benchmarking** to understand your gaps, but also understand where you stack up against your peers.

Finally, we will explore and **analytics journey** and in a real use case discover how a company transformed from a hindsight looking reporting factory to a forward looking predictive powerhouse.



Module 3: ML, AI and Advanced Analytics (\$399)

The biggest challenge to implementing analytics is to understand 1) What is analytics, 2) How to apply it, and 3) Where to get started. Implementing Analytics is not long, difficult, or expensive – it is simply just a discipline. In this module including 6 tailored classes from the Analytics Academy you will grasp how to become an analytics powerhouse who provide insight that influence decisions and foresight which impact the strategic direction of your company.

To implement Analytics you will first learn how to build the culture where the four critical components of Mindset, People, Processes and Systems are to be aligned.

With the culture in place many still do not have time to advance their analytics as they spend all their hours working on capturing and reporting data. Learn how to free up time with the concept of '**Eliminate & Automate™**' in order to elevate.

Also when aspiring to generate analytics understand the groundbreaking concept of **Systematic Thinking™** that enables you to find the insight no one else finds in your data.



With the foundation in place you are ready to start your Analytics Journey and will learn how to **start your first analytics project** as well as how to successfully implement and scale analytics in your organization.

You will also explore **Artificial Intelligence (AI) and Machine Learning (ML)** and the use of **AI-Enabled Analytics** to find the insight our brain capacity cannot find but AI finds it in a split second.

Finally, we will advance into the top shelf of analytics called Foresight and learn about Predictive Analytics and how it can be used for **Unbiased Forecasting**.

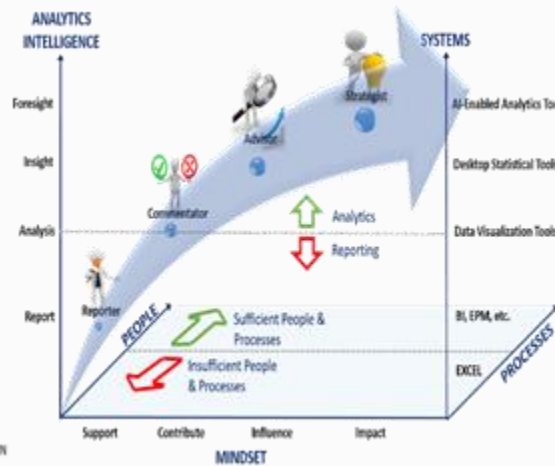
Module 4: Digital Transformation (\$399)

The Digital Roadmap is the first 6 classes in the Academy curriculum. It teaches you the foundation of Digital Transformation in the first 3 classes of

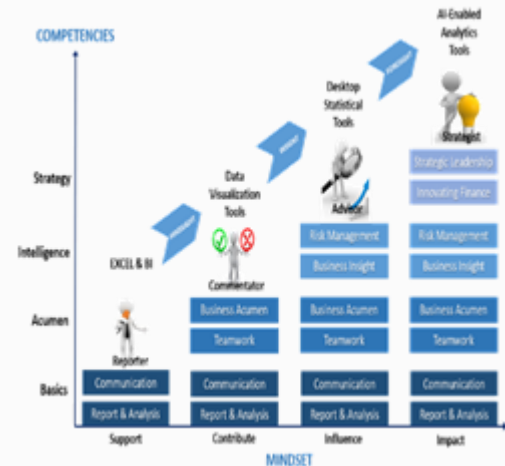
- 1) **Digital Values** - Are you creating value?
- 2) **Digital Culture** - Are you ready ?
- 3) **Digital Skillset** - Are you capable?



Are you Creating Value?



Are you Ready?



Are you Capable?

Meaning 1) HOW TO transform digitally and add value in the job you perform. 2) HOW TO align the Mindset, People, Processes, and Systems to transform and build a Digital Culture, 3) HOW TO develop the right and sufficient hard and soft skillset when operating in the new digital world,

The three areas are **assessed and benchmarked** in class 4. When setting a target for where you want to be in the future you will need to understand where you are today against your peers!

The Digital roadmap concludes with two classes where you will learn how to **build digital teams** including how to **manage employee performance** to maximize the output and become the department who glues in the entire organization together and guide the strategic direction of your company.



The Analytics Academy

The *Analytics Academy* where executives, directors, managers, and analysts learn the Digital Transformation Roadmap and build the hard and soft skills necessary to operate in the digital world. For as little as \$29 a month you can gain unlimited access to 30+ classes plus many additional services including a free benchmark report to understand where you stack up against your peers in the new digital world.

The Academy's syllabus is based on the book, *Implementing an Analytics Culture for Data Driven Decisions (2019)* and *AI-Enabled Analytics for Business (2022 published by Wiley)*, and *The Digital CFO (2024)*, all available on Amazon (Kindle and paperback).

Find our more at: www.fainstitute.com/the-analytics-academy/



Meet the Founders

Jesper H Sorensen, and Robert J Zwerling are the founders of the *Finance Analytics Institute* that fuses Finance and Operations with analytics.

Robert J Zwerling

Mr. Zwerling is also Managing Director of *Aurora Predictions* (www.aurorapredictions.com) providing *LightZ™* analytics with AI software designed for Finance and Operation, which includes an intuitive purpose-built user interface for the business analyst that removes the need for data scientists and programming. Mr. Zwerling is a regular speaker on predictive analytics and AI, participant of Stanford University's Hoover Institution, co-author of the book *Vigilance The Price of Liberty* and author of *America The Beautiful*, and has a Bachelor of Engineering (Magna Cum Lauda) from Stony Brook University, Master of Science in Mechanical Engineering (thermodynamics and fluid mechanics) from CSU Los Angeles, member Tau Beta Pi engineering honor society, and a Registered Professional Engineer in California.

Jesper H Sorensen

Mr. Sorensen is also the CFO of a global technology company and has been a finance executive in fortune 100 companies. He has a proven track record of advancing the analytics agenda, is a regular speaker on Digital Finance Transformation topics, and holds several advisory positions including advisory board member for Aurora Predictions and Advisory Board member for Born Capital. He has a Master degree in Economics and Management from the University of Aarhus, Denmark, certified Six Sigma Green Belt, and certified in Strategic Direction and Risk Management from Stanford University.

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