

Finance and FP&A Training Offerings

Enabling individuals and teams to maximize their potential



Courses Tailored to Meet the Needs of Your Staff



Tailored Training



Virtual Training



Onsite Training



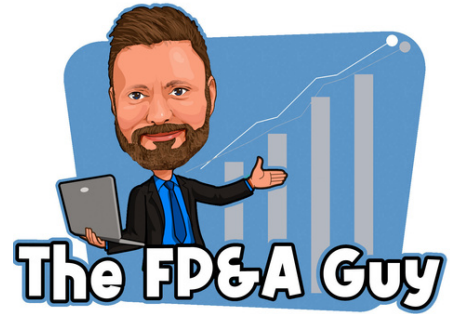
Ron Monteiro



Paul Barnhurst



Self-Paced Training

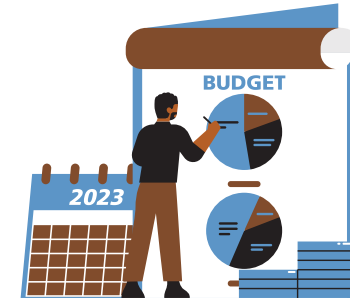


Courses

Pricing: \$3K USD and up, depending on length and customization requirements



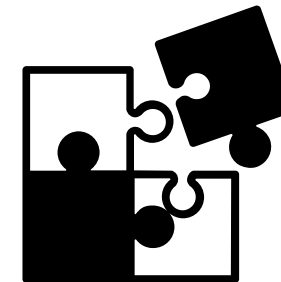
Storytelling, Business Partnering, and Influencing for Finance Professionals



Best-Practice FP&A (Budgeting, Analysis, Visualization, Storytelling & Influencing)



Practical Excel for Finance Professionals (Beginner to Advanced)



Problem-Solving and Decision Making (PSDM) for Finance Professionals



Top 10 Leadership Skills for Finance Professionals



Best-Practice Data Visualization



Cash is King/Queen for Business Leaders



All-Star Finance Team (Vision, Mission, Values)

Note: If you do not see a course listed that meet your needs, let us know, and we will develop a course specifically for you and your company's needs



Your Trainers



Paul Barnhurst

email: pbarnhurst@thefpandaguy.com

Paul is a Finance Professional with 12+ years of finance and FP&A experience, including business unit CFO roles. Paul earned a business bachelor's degree from BYU and an MBA and Master of Science in Information Management from Arizona State University.

Paul has a strong background in financial planning, financial modeling, report building, and business partnering. He is known for his deep understanding of the FP&A software planning space and has recently published an FP&A software market guide. He is also a big advocate of Microsoft Excel and is a LinkedIn influencer.

Paul runs his own business providing training services, is a content creator, and hosts one of the most popular FP&A Podcasts called FP&A Today.



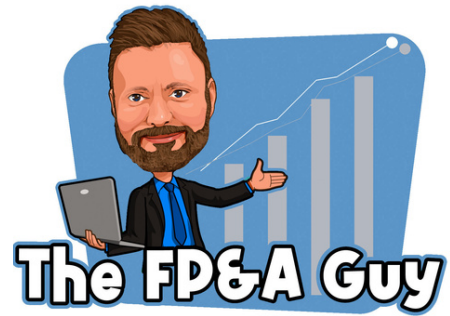
Ron Monteiro

email: ron.monteiro18@gmail.com

Ron is a Finance & Business Professional with 15+ years of finance and FP&A experience, including VP of Finance at a Canadian beverage company. Ron earned his Bachelor of Commerce degree from the University of Toronto and has his CPA, CMA designations. Ron has worked at several top-tier companies, including Hitachi, Kraft Foods, and Campbell Soup.

Ron facilitates training sessions for Clear Concept Inc. and is the lead facilitator for the high-performance team's program. He is also a 'Culturepreneur coach' for Waterstone Human Capital.

Ron has a deep understanding and passion for helping Finance and Accounting individuals develop world-class communication and presentation skills.

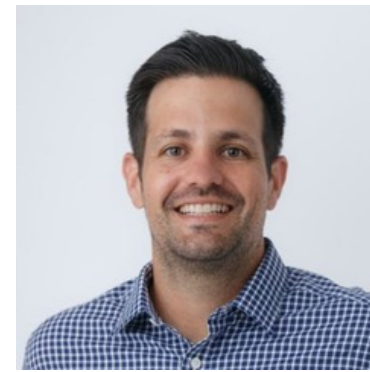


Training Testimonials



Jennifer Caron
CBU Manager
Mars Canada

“Amazing course! All 4 sessions added tremendous value to my role and team. They were all very relevant to not just F&PA, but any Finance role. The visualizations really allowed me to understand how to display and share my story in a more understandable way (not just within finance). You both provided incredible tips, resources and examples that catered to everyone. “



Steve Groccia,
Product
Mosaic Tech

“Amazing sessions by Ron & Paul. Incredible rapport between both of them. Valuable, practical and digestible content for us to get closer to the problems we are solving.”



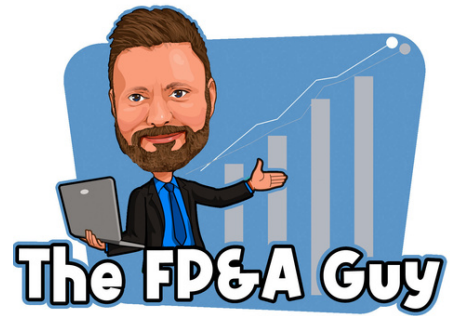
Tolga Hocanin
CFO Lindt
Canada

“Truly an incredible session that helped us sharpen our skills to be more effective at our jobs. Your hands on and example heavy approach really helped the team absorb the material quickly and implement in their day to day work faster.”



Deepak Bhandari
VP FP&A & Strategy
High Liner Foods

“Paul’s approach is fantastic and his ability to educate you on key principles and new formulas to help structure your data in the most efficient way is incredible. I would highly recommend any FP&A team to invest time and training on such an important skill set that all FP&A professionals should have.”



Course Details



Storytelling, Business Partnering, and Influencing for Finance Professionals

Target Audience: Analysts, Managers

Learning Objectives:

- Gain an understanding of why soft skills are so important
- Learn and practice practical strategies to improve storytelling, business partnering, and influencing skills

Instructors: Ron Monteiro and Paul Barnhurst

Session Availability:

- 1.5 Hours
- 3 Hours
- Full Day



Problem-Solving and Decision Making (PSDM)

Target Audience: Analysts, Managers

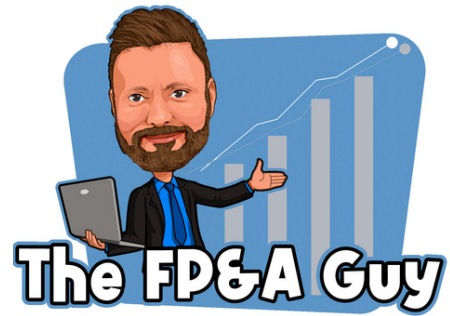
Learning Objectives:

- Learn a structured approach to define and analyze problems
- Apply the PSDM framework to case studies designed to simulate the actual work environment

Instructors: Ron Monteiro and Paul Barnhurst

Session Availability:

- 1.5 Hours
- 3 Hours
- Full Day



Tailored Course Offerings



Practical Excel for Finance Professionals (Beginner to Advanced)

Target Audience: Finance Professionals

Learning Objectives:

- Learn ways to be more efficient and effective with Excel
- Learn best practice design principles for building models
- Utilize tables, pivot tables, Power Query, functions, and Dynamic Arrays to be more effective and efficient working in Excel

Instructors: Ron Monteiro and Paul Barnhurst

Session Availability:

- Any length available from 1 hour to a full day



Best-Practice FP&A

Target Audience: Analysts, Managers, Directors

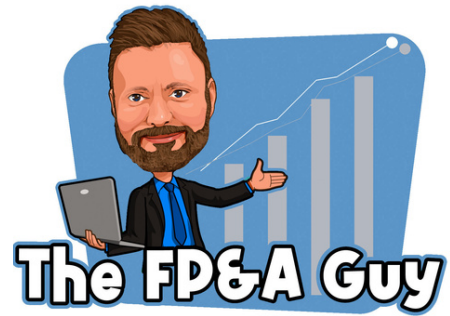
4 Course Sessions Include:

- FP&A Overview & Analytics That Drive Insights
- Best Practices in Budgeting & Forecasting
- Management Reporting & Best-in-Class Data Visualization
- Business Partnering, Storytelling & Influencing

Instructors: Ron Monteiro and Paul Barnhurst

Session Availability:

- 2 hours up to 2 days
- Virtual cohort course, register individual employees for a session today at [Best Practices FP&A Course](#)



Tailored Course Offerings



Top 10 Leadership Skills for Finance Professionals

Target Audience: People Leaders

Learning Objectives:

- Learn practical skills to develop a common approach to building engagement with your teams
- Learn proven methods for building a high-performing team

Instructors: Ron Monteiro and Paul Barnhurst

Session Availability:

- 1.5 Hours
- 3 Hours
- Full Day



Best-Practice Data Visualization

Target Audience: All Finance Professionals

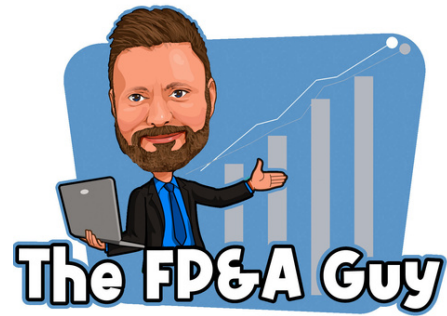
Learning Objectives:

- Learn best practice techniques on how to build visuals that tell a story
- Learn how to build several visuals that will enhance your finance presentations

Instructors: Ron Monteiro and Paul Barnhurst

Session Availability:

- 1.5 Hours
- 3 Hours
- Full Day



Tailored Course Offerings



Cash is King/Queen for Business Leaders

Target Audience: Finance or Cross-functional Teams

Learning Objectives:

- Learn practical strategies to drive cash flow and working capital improvements
- Gain in-depth knowledge on working capital and cash flow levers, including (OI, DPO, DSO, DIO, and Capital)

Instructors: Ron Monteiro and Paul Barnhurst

Session Availability:

- 1.5 Hours
- 3 Hours
- Full Day



All-Star Team Finance Training (Vision, Mission, Values)

Target Audience: All Finance Professionals

Learning Objectives:

- Learn how to build a vision statement that inspires and motivates your team
- Develop an action plan to implement your team's vision, mission, and values

Instructors: Ron Monteiro and Paul Barnhurst

Session Availability:

- 4 Hours
- Full Day