MDA TRAINING

Financial & Commercial Skills

A suite of workshops & simulations to build commercial capability

FINANCIAL & COMMERCIAL SKILLS

Finance for **non-financial managers**

Our programme is comprised of **10 bitesize workshops** *(60-90 minutes each)* where each module builds on the previous, forming a structured developmental pathway in finance, for all commercially focused participants' financial knowledge, helping them make more informed decisions and build their confidence to raise issues and justify decisions. **The programme can run as virtual classes, or blended into a half-day or full-day in-class format** – *or you can pick and choose modules to design your own workshop.*

01
HOW IS COMMERCIALITY MEASURED?
Your specific KPIs - Commercial management information - Understanding the income statement - Revenue, costs and margin - Business gross margin, adjusted operating profit and EBITDA - Link to internal PK

02
REVENUE MANAGEMENT STRATEGIES
Drivers of revenue - Pricing and volume - Product/service mix - Impact on profitability - Revenue management strategies - Core and marginal revenues - New revenue sources - New product development - Link to internal PK

03
CORE COSTS IN YOUR BUSINESS
Core and hidden costs - How costs are captured - Standard costing, absorption costing and marginal costing - How products and services are costed - Linking resource consumption to activity - Link to internal PK

04
COST BEHAVIOUR & MANAGEMENT
Fixed, variable and other costs - Budget setting - Forecasting based on expected activity - Learning from the 7 wastes - Lean delivery - Cost management strategies - Efficient service improvements - Link to internal PK

05
PRICING APPROACHES
Pricing products and services - Pitching at cost of delivery - Loss leaders, cost-based, market-driven and target costing - Price elasticity - Price change customer tolerance - Link to internal PK

06
MARGIN ATTRIBUTION ACROSS THE VALUE CHAIN
The value chain - Procuring services and supplier management - Input-output - Customer experience - Distribution of products and services - Attributing cost to value centres - Assessing product and service profitability - Link to internal PK

07
MANAGING MARGIN ACROSS CATEGORIES
Product/service segmentation - Bundling and unbundling - Customer service strategy - Measuring marginal and total margin - Measuring A&P effectiveness - Link to internal PK

08
VALUE CREATION STRATEGIES
What is business value? - Value capture tree - Translating actions into value impact - Testing actions against commercial impact - What can I do in my role to directly impact the value tree?

09
CONVERTING MARGIN INTO CASH FLOW
Importance of cash flow - Cash as profit - Drivers of cash flow - EBITDA, working capital and capex - Strategies to grow EBITDA - Strategies to reduce working capital - Efficient capital allocation - Link to internal PK

10
BALANCE SHEET DRIVERS
High-level view of capital allocation - Cost of holding capital - Capital drivers – working capital and core assets - Working capital and investment management strategies - Link to internal PK

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● IN-PERSON | ● VIRTUAL

FINANCIAL & COMMERCIAL SKILLS

Commercial **decision making**

Our commercial decision making workshop *will enable your managers to make more robust, commercially-focused decisions. It provides a* **logical step-by-step approach** *to evaluating options, frameworks for effective long-term investment decisions, tools to identify and assess risks, and methods to financially appraise options considering all relevant cash flows.*

FORMAT
Interactive Case Study + Six-Stage Framework

AUDIENCE
Managers & senior decision makers

DELIVERY
In-person or Virtual

INTERACTIVE CASE STORY
The workshop is centred around an interactive case study aligned to the six-stage decision-making framework. Participants, working in teams, tackle a real-life commercial decision – drawn from your organisation's own context, a future decision in the pipeline, a custom case study, or one of our proven generic cases.

1
DECISION-MAKING FRAMEWORK
Understanding the situation - Deciding on issues/problems to solve - Generating options - Assessing options - Identifying and evaluating risks - Financially appraising options

2
UNDERSTANDING THE SITUATION
Deciding on the issues/problems to solve - What commercial decision-making means in your organisation - What does commercial success mean? - Taking positive and commercially robust decisions

3
GENERATING OPTIONS
Generating all possible options - The importance of the 'do-nothing' option - The "halfway house" option - Options that increase flexibility for future decisions

4
IDENTIFYING & EVALUATING RISKS
A framework for assessing and evaluating risks - Identifying risks - Quantifying risks - Evaluating risks and their impact on the decision

5
ASSESSING OPTIONS
Relevant cash analysis - Grid analysis - Paired comparison analysis - Decision trees - PESTLE analysis – assessing options against the future external environment

6
FINANCIAL APPRAISAL
Identifying relevant cash flows - Sunk costs - Fixed overheads - Buy or lease decisions - Long-term capital appraisal techniques

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FINANCIAL & COMMERCIAL SKILLS

Commercial selling skills **(consultative selling)**

A workshop that provides a practical framework *for sales professionals to demonstrate the tangible financial benefit of your product and solutions to customers. We develop, with you, a* **value driver framework** *built around a client prospect or target industry – exploring how your customers measure commercial success and the KPIs they use to drive performance, positioning your solutions in a commercially compelling, financially quantifiable way.*

1
KEY MEASURES OF FINANCIAL PERFORMANCE
Income statement measures - sales, gross profit, EBIT, EBITDA, net income - Understanding the commercial context - Balance sheet measures - Fixed asset utilisation, working capital management

2
TEASURING VALUE IN A CUSTOMER
The concept of economics profit - Measuring return on capital - Drivers of return – margin and asset utilisation - Drivers of margin - Drivers of asset utilisation

3
COST DYNAMICS OF A CUSTOMER
Full cost of cost - Cost behaviour - Measuring operational leverage - How your product/solutions impact operational leverage - Standard and marginal costing - Structuring a solution to reflect a customer

4
NON-CAPITAL INVESTMENT
Investment appraisal basics - Capturing ROI - Measuring ROI effectiveness - Marketing effectiveness - What products/solutions you offer customers in this area - Key intangible investments cross-industry

5
BALANCE SHEET MANAGEMENT
Capital employed - Fixed and tangible fixed asset utilisation - Strategies to improve utilisation - Increased efficiency, effective investment, knowing when to divest

6
INCREASING EFFICIENCY
Through put and process management - Automation management - Efficient design principles - Identifying and eliminating bottlenecks - How your products/solutions help enhance operational efficiency

7
MAKING EFFECTIVE INVESTMENTS
How customers appraise investments - What makes an effective investment - Investment appraisal techniques - Value drivers in capex requests - Positioning your solutions in a capex context

8
WORKING CAPITAL & SUPPLY CHAIN
Working capital components - Managing working capital - Minimisation — risk vs reward - Managing inventory - Effective supply chain management - Impact of production efficiency on working capital

9
APPLICATION TO CUSTOMER PROFILES
Bringing it all together - Participants apply the framework to identify key performance levers - Decide which products/solutions will have most impact - Quantify this impact with likely sensitivities

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FINANCIAL & COMMERCIAL SKILLS

Business simulation — **driving commercial success**

Our **Commerciality** *business simulation gives your people a real-time opportunity to practise the key skills needed to drive commercial success. In teams, participants set up, manage and grow an operational business – wrestling with strategy, finance, solution design, customer service and a changing competitive landscape.* **Each simulation is unique to your organisation**, *available as a 1-2 day physical experience or phased virtual delivery.*

YEAR ONE
ESTABLISHING THE BUSINESS

PLANNING & YEAR ONE
- Developing the initial strategic plan
- Analysing product, customer and market demand
- Designing operational systems and processes
- Delivering a service culture to exceed expectations
- Developing initial supply chain
- Prioritising revenues, cash flow and profitability
- Ensuring the team is at its best

FINANCIAL & STRATEGIC REVIEW
- Team performance review against KPIs
- What did your team excel at?
- How well are you performing as a leader?
- What would you do differently?

YEAR TWO
RUNNING THE BUSINESS

PLANNING
- Addressing priorities from year one
- Commitment to improving customer experience
- Improving the operating model
- Strategic steps to enable market expansion
- Becoming more efficient through economies of scale
- Enhancing team capability

YEAR TWO – RUNNING THE BUSINESS
- Expanding international sales and operations
- Improving performance through operational excellence
- Reducing operational incidents

FINANCIAL & STRATEGIC REVIEW
- Identifying key learning points
- What have you learnt about effective teamwork?
- Choosing your attitude in the face of setbacks

YEAR THREE
GROWING THE BUSINESS

PLANNING
- Expanding the business and service offer
- Exceeding customer expectations
- Entering and growing new markets
- Identifying opportunities for market and product development
- Continuous improvement and innovation

YEAR THREE – GROWING THE BUSINESS
- Maximising sales and profit growth
- Dealing with bottlenecks and management projects
- Securing value from collaboration
- Securing value from new strategic opportunities

REVIEW
- Score against leadership behaviours and KPIs
- Reflect on personal leadership edge

BRINGING IT ALL TOGETHER

FINAL RESULTS
- The final results are revealed

INDIVIDUAL, TEAM & COACH REVIEW
- What have you learnt about yourself?
- Gain specific coach feedback
- What will you stop, start, continue?
- Feedback on development edges

LEARNING COMMITMENTS
- Setting/re-inspire and commit to what they will take back and apply in the workplace

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Business simulation — **operational effectiveness**

This simulation helps participants understand your business model and KPIs, gaining first-hand insights into how their behaviour impacts financial outcomes. Centred around our unique **InformationExchange** *simulation, participants design and tailor an end-to-end business solution for a commercial customer – learning to make the correct cost, risk and value trade-offs.*

SIMULATION BRIEFING

COMMERCIAL MANAGEMENT
- What does commercial management mean?
- Reviews of your operating model
- High-level review of income statement and balance sheet
- Review of your KPIs
- Key figures and drivers of performance
- What changes in behaviour will improve performance?

SIMULATION BRIEFING
- Teams design a business solution process to meet a commercial brief
- Enter an arena and build a structure transmitting data end to end
- Each team is allocated a segment of information available components

SIMULATION PLANNING
- Teams plan how to construct the process effectively
- Plan consider how to measure end-to-end performance

PHASE 1 – DEVELOPING A BUSINESS SOLUTION

MEETING WITH A CUSTOMER
- They present their solution - customer sets out three different requirements
- Each requirement increases value add and would generate higher revenue

CONSTRUCTING THE BUDGET
- Each team constructs a budget of capital and operating costs for the three offerings

NEGOTIATING WITH THE CUSTOMER
- Teams present their solution and highlight the value in their offering
- Customer seeks discounts – teams must hold their nerve and create a win-win

DECISION & DELIVERY
- Delivering the solution to specification, on time and to budget
- Continuous operational excellence is the end-to-end process

FINANCIAL & TEAM REVIEW
- Review of commercial performance - Customer satisfaction - Embedding good commercial behaviour

PHASE 2 – CHANGE OF CUSTOMER REQUIREMENTS

INTEGRATING THE END-TO-END PROCESS
- Teams receive a schedule of customer requirements – data must be transmitted within a maximum time
- A list of other requirements for teams to prioritise

IMPROVING OPERATIONAL EFFECTIVENESS
- New components available at varying costs
- Components to be integrated or customer site redesigned
- Build, design and operate the improved end-to-end process
- Teams gain value according to customer requirements, costs and resources

FINANCIAL & TEAM REVIEW
- Cost of meeting the customer objective
- Cost benefit of the redesigned system
- Was the redesigned system over-engineered?
- What had a positive impact on the business?
- What were the barriers?
- How can we embed the learning back to the workplace?

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FINANCIAL & COMMERCIAL SKILLS

Why **choose us?**

Our difference
We combine commercial realism with behavioural insight, ensuring financial and commercial lessons translate directly into day-to-day decisions. Our programmes are grounded in your actual KPIs and management information.

Proven track record
Trusted by global banks, Fortune 500s, defence leaders and tech innovators. Our facilitation team brings both commercial expertise and world-class learning design to every engagement.

Flexible delivery
In-person, digital, or hybrid – each programme is designed to scale to your needs. Pick individual modules or run the full suite as a structured developmental pathway across your organisation.

Measurable impact
Participants leave with sharper commercial instincts, practical frameworks, and renewed confidence to raise financial issues, justify decisions, and drive value in their role.

Ready to build commercial capability across your organisation?
Contact us to explore how our Financial & Commercial Skills suite can be tailored to your needs.

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