

# Finance 2.0: Leading with Data & AI

 Programme Dates – December 3 & 4, 2026

 SPJIMR Delhi Campus

## Programme Genesis

In an era defined by data abundance and AI-powered analytics, financial intelligence is no longer the exclusive preserve of finance professionals. Non-finance managers across manufacturing, services, and project-driven industries are expected to make decisions that are commercially sound, strategically aligned, and data-backed. Yet most managers have had limited formal exposure to finance — and even less to the AI tools that are now reshaping how financial data is analysed and acted upon.

Finance 2.0: Leading with Data & AI is designed for exactly this need. It goes beyond traditional financial literacy to equip managers with the practical skills to use AI tools — including generative AI, dashboards, and automation — for financial analysis, forecasting, and business decision-making. This programme creates a new breed of data-informed managers who can bridge the language of finance and the power of technology.



## Programme Goals

This programme aims to equip managers from non-finance functions with the financial intelligence and AI fluency to make sharper, commercially sound decisions. The key outcomes include:

- **AI-Augmented Financial Intelligence:** Use AI tools to analyse financial statements, generate insights, and build scenario models — without writing a single line of code.
- **Data-Driven Decision Confidence:** Read and interpret key financial metrics and KPIs to make informed decisions in their domain.
- **Cross-Functional Financial Communication:** Engage effectively with CFOs, finance teams, and business partners using a shared financial vocabulary.
- **Operational Finance Mastery:** Understand how day-to-day decisions in manufacturing, services, and projects affect the P&L, balance sheet, and cash flows.
- **Business Forecasting & Planning:** Leverage AI-powered tools for budgeting, variance analysis, and rolling forecasts.



## Programme Coverage

The programme is structured around seven integrated themes spread across two days. Each theme combines conceptual grounding with a live AI component, ensuring participants build both financial understanding and practical AI fluency simultaneously.



### 1 Theme 1: The Language of Finance & Financial Statements

P&L, Balance Sheet, and Cash Flow — how they connect and what they reveal. Key financial vocabulary (EBITDA, working capital, ROE, leverage) decoded in business context. Industry lens across manufacturing, services, and project businesses.

- AI Component: Participants use AI tools to extract KPIs from published annual reports, flag risks, and map data to financial statements — building prompt discipline from the first session.

### 2 Theme 2: Financial Ratios as a Management Compass

Profitability, liquidity, efficiency, and leverage ratios — how to benchmark performance, spot operational red flags, and apply ratio intelligence to their specific domain and industry context.

- AI Component: AI-powered ratio dashboards — automated benchmarking and trend identification using Copilot or ChatGPT integrated with Excel.

### 3 Theme 3: Cost Intelligence & Break-Even Thinking

Fixed vs. variable costs, contribution margin, break-even analysis, and Activity-Based Costing. How cost structures differ across manufacturing (Bill of Materials, overheads), services (FTE-cost models), and project businesses (cost-to-completion).

- AI Component: Real-time AI scenario modelling — simulate the financial impact of pricing changes, volume shifts, and cost-reduction initiatives on profitability.

### 4 Theme 4: Capital Investment & Business Case Decisions

Time Value of Money, Payback Period, NPV, and IRR — applied to capex decisions, technology investments, and project proposals. How to build a compelling, finance-ready business case that withstands scrutiny.

- AI Component: AI-generated business case templates — use AI to stress-test assumptions, model sensitivity, and refine investment narratives for leadership presentations.

### 5 Theme 5: Budgeting, Forecasting & Variance Analysis

The annual budgeting process, rolling forecasts, and variance analysis (price, volume, and efficiency variances). Connecting budget outcomes to operational decisions and understanding how a manager's choices show up in monthly MIS reports.

- AI Component: AI-assisted variance commentary — automate monthly MIS analysis and generate management-ready variance explanations using structured AI prompts.

### 6 Theme 6: Working Capital, Cash Flow & Operational Finance

The cash conversion cycle, working capital levers (inventory optimisation, debtor collection, payable management), and cash flow forecasting. Sector-specific working capital challenges in manufacturing, services, and project businesses.

- AI Component: AI-powered cash flow forecasting — build a rolling cash forecast and use AI to identify top cash risks and recommend corrective actions.

### 7 Theme 7: Financial Dashboards & Data-Driven Storytelling

Principles of effective financial reporting, KPI selection by function, and visual storytelling with financial data. How to present numbers in a way that informs, persuades, and drives decisions at the leadership level.

- AI Component: Live dashboard build — participants create a functional financial KPI dashboard using AI-assisted Excel or Google Sheets, complete with automated narrative commentary.

### Capstone: The Financial Leadership Challenge

An integrative simulation spanning all seven themes. Teams receive a comprehensive real-world business scenario — combining a stressed P&L, working capital pressure, a pending investment decision, and a budget variance — and are required to deliver a board-ready financial brief. The full analysis is conducted using AI tools. Each team presents their financial analysis, recommendations, and financial impact summary to peers and faculty.

## Who Should Attend

This programme is designed for managers who are analytically curious but have had limited formal exposure to finance. Ideal participants include:

- Senior and middle-level managers from non-finance functions: Operations, Supply Chain, Engineering, HR, Marketing, and IT.
- Project Managers in core industries such as EPC, infrastructure, and manufacturing seeking to understand project P&Ls, cost controls, and variance reporting.
- Business Unit Heads and Functional Leaders seeking to align their decisions with financial strategy.
- Entrepreneurs and SME owners who need to manage business finances and engage with investors and lenders.
- Professionals from service industries — IT, consulting, BPO, and BFSI — wanting to improve their business case and profitability analysis skills.

## Pedagogy

Finance 2.0 is built on the conviction that financial intelligence is best acquired through doing, not watching. Every theme combines conceptual clarity with immediate application. The pedagogical approach integrates:

### Reflective Practice & Action Planning:

Each day closes with structured reflection ensuring learning is connected to each participant's specific role and context.

**Live AI Labs:** Every theme includes a structured, guided hands-on activity using real or simulated financial data with AI tools — building practical fluency, not just awareness.

### Personalised AI Prompt Library:

Participants develop their own library of AI prompts for financial analysis tasks — a take-home toolkit for immediate application back at work.

### Industry-Anchored Case Studies:

Cases are drawn from services, core manufacturing, and project management domains to ensure relevance across the participant cohort.

### Financial Simulation Exercises:

Gamified exercises on cost decisions, working capital management, and investment choices build intuition in a risk-free environment.

### Cross-Industry Peer Learning:

Structured group work across industries creates rich dialogue — a services manager learning from a plant head, a project manager exchanging frameworks with an HR leader.





## ABOUT SPJIMR

SPJIMR is counted among the top 5 B schools of India. In addition to our Mumbai campus, we also have a state-of-the-art Executive Education Centre in Delhi.

We are a part of the Bharatiya Vidya Bhavan and function as an autonomous Institute with entrepreneurial agility. Our guiding principles are to influence practice and promote value-based growth. We build on this through pedagogic innovations and pioneering programmes, which have helped us carve a unique and distinctive path in management education.

SPJIMR has been accredited by the Association to Advance Collegiate Schools of Business (AACSB), Association of MBAs (AMBA) (UK), and EFMD Quality Improvement System (EQUIS).

SPJIMR is part of an elite group of institutions globally to achieve the prestigious 'Triple Crown' of accreditations, placing it among the top 1% of global business schools.

In the Financial Times MiM 2025 Ranking, SPJIMR stands out as the top-ranking Indian B-school, securing the 35th spot globally and #3 in India.

Our salient features are as follows:

- 44 years legacy of management education
- 25+ years of executive education
- Over 15,000+ alumni
- 100+ Corporate Partners
- 50+ Global Partners
- Renowned faculty with extensive corporate experience
- Globally recognized among top 5 B-Schools from India
- Triple Crown International accreditation by AMBA, AACSB & EQUIS

### Certification

**Participants who successfully complete the program will receive a certificate of participation from SPJIMR.**

**Fees: Rs 24,900 per participant + applicable taxes (Early Bird, Alumni and Group Discount applicable)**

For more information contact-

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## PROGRAMME DIRECTOR



**Prof. Anshul Verma**  
Professor,  
Finance and Accounting

Dr. Anshul Verma is working as Professor in the Accounting and Finance Area at S. P. Jain Institute of Management & Research, Mumbai, INDIA. He holds a double Master's degree, in Management with specialization in Finance from Birla Institute of Management Technology and in Economics from Dr. B. R. Ambedkar University, Agra. He has also earned a dual Ph. D. in the area of Credit Risk Management and in the area of Applied Business Economics from Dr. B. R. Ambedkar University, Agra.

He has around 2 decades of rich experience in teaching, training and research in the area of Accounting and Finance and he has also held administrative responsibilities, including serving as the programme head for flagship academic programmes of top ranked Business Schools in India. His research interests include behavioural finance, entrepreneurship, corporate disclosures, impulsive buying, and financial markets, and he has contributed extensively to academic journals and periodicals.

He teaches subjects like Financial Accounting, Management Accounting, Cost Management, Advanced Cost Management, Derivatives and Risk Management, Corporate Finance and other areas of finance to Post Graduate Programme Students and Executive Programme Participants.

He has also successfully delivered trainings and Management Development programmes to Middle and higher management personnel in organisations like Power Management Institute of NTPC, IL&FS Clusters, Hero Motocorp, Sun Pharma, Biocon Pharma, MSD Pharma, Pidilite Industries, Swades Foundation, Cummins and AstraZeneca to name a few. He had also been a trainer and mentor in Goldman Sach's 10,000 women entrepreneur programme.

He has published research papers in Management domain in reputed international publications and also in journals of national repute.

