Lead Innovative Technologies

Course Content for Freshers – US CMA Strategic Modelling + Oracle PBCS & EPBCS

1: Foundation (Basics of Finance & Planning)

1. Introduction to Financial Planning & Analysis (FP&A)
2. Importance of Budgeting, Forecasting, and Strategic Planning in Business
3. Key Financial Terms & Concepts (Revenue, Expenses, Profit, Cash Flow, Balance Sheet)
4. Introduction to US CMA Strategic Modelling – why it matters
5. Overview of Enterprise Performance Management (EPM)

2: Strategic Planning (Beginner Friendly)

1. What is Strategy? Basics of Business Planning
2. **Internal & External Factors** – simple examples (competition, resources, customers)
3. Mission, Vision, and Long-Term Goals (with case study)
4. SWOT Analysis – hands-on exercise
5. Business Scenarios (Best Case, Worst Case, Likely Case)

3: Budgeting & Forecasting (Step-by-Step)

1. **Budgeting Basics**
   - Why companies make budgets
   - Simple budget example (household budget → company budget)
2. Types of Budgets
   - Top-Down & Bottom-Up
   - Flexible Budgets
   - Zero-Based Budgeting (ZBB) – explained with examples

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3. **Forecasting Basics**
    - What is a forecast? Difference between budget & forecast
    - Simple forecasting methods (Trend, Moving Average)
    - Introduction to Sensitivity Analysis (What if sales drop by 10%?)
4. Master Budget Basics
    - Operating Budget
    - Cash Budget
    - Simple Pro forma Statements

4: Oracle Planning Solutions – PBCS vs. EPBCS

1. **Introduction to Oracle EPM Cloud**
    - PBCS (Planning and Budgeting Cloud Service)
    - EPBCS (Enterprise Planning and Budgeting Cloud Service)
2. **Key Differences (Simple for Freshers):**
    - **PBCS** → Flexible, customizable planning solution; customers build all modules from scratch.
    - **EPBCS** → Comes with **prebuilt frameworks** (Workforce, Projects, Capital, Strategic Modeling) for faster adoption.
    - **PBCS** = Good for companies needing custom models.
    - **EPBCS** = Best for large enterprises needing standard models.
3. Why Companies Are Moving to EPBCS from PBCS

5: Core PBCS Training (Hands-On for Freshers)

1. Creating a Planning Application
2. Working with Dimensions (Accounts, Periods, Entities, etc.)

3. Creating Planning Forms & Dashboards
4. Entering Data into Planning Forms
5. Running Jobs & Validating Data
6. Smart View Basics (Excel Integration)
7. Managing Application Settings & Databases
8. Introduction to EPM Automate (basic automation concepts)

6: Core EPBCS Training (Hands-On for Freshers)

1. Creating Applications & Navigating the Interface
2. Understanding Prebuilt Modules:
    - Workforce Planning (Headcount, Salary Planning)
    - Project Planning (Cost & Revenue Planning)
    - Capital Planning (Assets & Depreciation)
    - Strategic Modelling (What-If Analysis, Long-Term Scenarios)
3. Using Sandboxes for safe testing
4. Working with Valid Intersections & Data Maps
5. Managing Jobs & Validations
6. Introduction to Rolling Forecasts with EPBCS

7: Business Rules & Reporting (Beginner Level)

1. What are Business Rules? (explained with simple finance logic)
2. Basics of Calculation Manager (no coding, focus on templates)
3. Creating a Simple Report in PBCS & EPBCS
4. Understanding Valid Intersections & Data Maps
5. Linking Reports to Pro forma Statements

8: Capstone Mini Projects (For Freshers)

1. Build a Simple Budget (Revenue & Expense Plan) in PBCS
2. Create a Rolling Forecast (3-month forecast model) in EPBCS
3. SWOT Analysis + Pro forma Statement (Finance + Planning link)
4. Final Project – End-to-End Planning Cycle:
    - Set assumptions → Create budget → Run forecast → Generate report

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✅ **Outcome for Freshers:**

- Understand **finance domain concepts** from US CMA Strategic Modelling.
- Hands-on experience with **both PBCS (custom planning)** and **EPBCS (enterprise prebuilt modules)**.
- Ability to explain differences between PBCS & EPBCS in interviews.
- Ready for roles like **EPM Analyst, FP&A Associate, or Planning Consultant (PBCS/EPBCS)**.

Recommendation:
Deliver as a **50-hour fresher program**:

- 15 hours → Finance & US CMA Strategic Modelling basics
- 15 hours → PBCS hands-on (custom planning)
- 15 hours → EPBCS hands-on (prebuilt modules + automation)
- 5 hours → Projects, case studies, interview prep