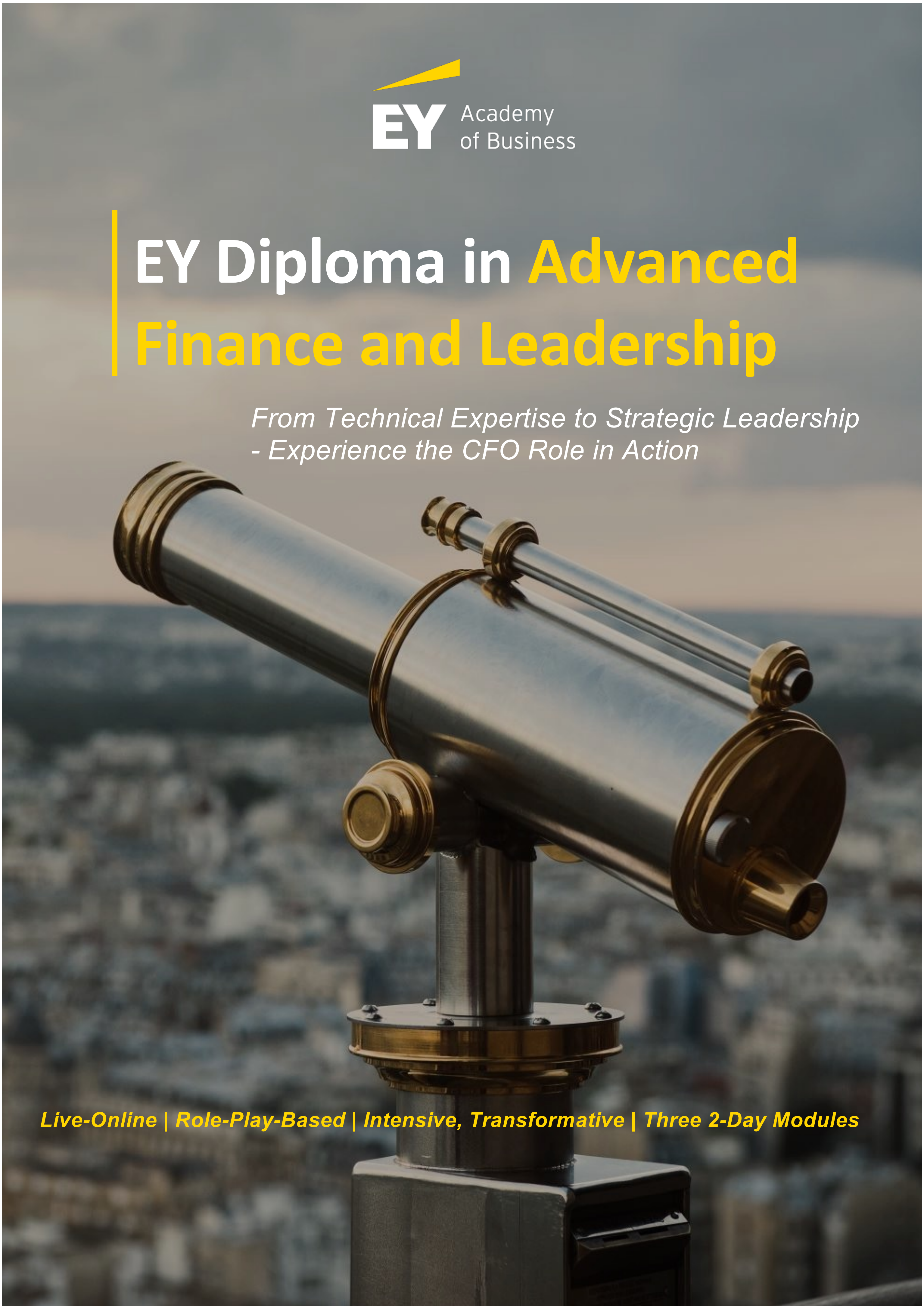
EY Academy of Business

EY Diploma in Advanced Finance and Leadership

From Technical Expertise to Strategic Leadership - Experience the CFO Role in Action



Live-Online | Role-Play-Based | Intensive, Transformative | Three 2-Day Modules

The Advanced Finance and Leadership Programme

Overview

This strategic finance leadership programme is built around a continuous, immersive business simulation. Participants move seamlessly between technical decision-making and leadership actions, receiving targeted feedback precisely at the moment each skill is required.

The programme shifts focus beyond compliance and transaction processing toward value creation using insight to influence decisions, shape outcomes, and integrate effectively across the organization.

Selected sessions draw on well-established psychometric tools, including DiSC Communication Styles and the Reiss Motivation Profile®, to deepen self-awareness and strengthen leadership effectiveness.

Programme Details

The Advanced Finance and Leadership programme consists of three modules:

- Module 1: Corporate Treasury and Derivative Hedging Strategies
- Module 2: Mergers & Acquisitions – Strategy and Deal Mechanics
- Module 3: Advanced Investment Appraisal and Capital Structure

Each module is structured into into four 4-hour sessions, delivered over two consecutive days, and focuses on technical content, developing leadership skills and providing structured feedback to reinforce learning and improvement.

Across these three modules, participants engage in a realistic, coached business simulation that mirrors the most critical moments of a CFO's role, from cash crunches and strategic pivots to high-stakes stakeholder pressure.

Each module blends financial role-play with targeted leadership development. Leadership interventions are deliberately timed between rounds of simulation work. For example, following a board presentation, a group session preparing for a board meeting, or a negotiation with the senior management team of a target entity in an M&A scenario.

Participants apply feedback immediately, refining and strengthening their skills in subsequent rounds of financial simulation to ensure measurable behavioural and strategic impact.

An EY Diploma will be issued at the end of the programme upon completion of an assessment.

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Methodology

The programme blends academic rigor with practitioner insights using:

- Expert-led training that explains key frameworks and best practices, drawing on extensive hands-on experience from real Assessment, Development and Training programmes for aspiring Finance Executives and CFOs.
- Real-life case studies showcasing liquidity crises, hedging applications, and landmark M&A deals.
- Hands-on exercises in liquidity modelling, VaR analysis, and valuation techniques.
- Embedded leadership and soft-skills development, including psychometric insights, structured feedback, and coached behavioural practice.
- Group discussions and simulations to encourage peer-to-peer learning and strategic thinking.
- Practical tools and templates for immediate workplace application.

For Whom?

This programme is designed for:

- CFOs, Treasurers, and Finance Directors seeking to strengthen their strategic financial leadership.
- Risk Managers and Corporate Treasurers responsible for liquidity and market risk oversight.
- M&A, Strategy, and Corporate Development Executives involved in deal evaluation and execution.
- Investment Bankers, Consultants, and Private Equity Professionals looking to refine valuation and transaction skills.
- Senior Accountants and Controllers managing treasury operations and hedge accounting

Module 1 | Corporate Treasury and Derivative Hedging Strategies

The first module focuses on strategic treasury leadership. Participants design and justify risk-management frameworks, evaluate derivative strategies, and align financial risk decisions with board expectations and enterprise value creation.

Technical Skills

Participants will:
- Articulate a clear, board-aligned risk appetite for FX, interest-rate, and commodity exposures.
- Develop treasury and hedging frameworks that safeguard margins and cash flows while enabling business flexibility and supporting long-term value creation.
- Evaluate and recommend hedging strategies at a strategic level (justifying instrument selection) based on their effect on earnings stability, cash flow predictability, and competitive positioning.

Simulation activities include:
- Role-played Treasury Committee.
- Pressurized board presentations.
- Shareholder Q&A stress tests.

Leadership Skills

Participants will:
- Discover how individuals differ in behaviour and communication preferences, and how organizations can leverage these differences to enhance performance.
- Learn why adapting messages to diverse recipients is critical for clarity, engagement, and business effectiveness
- Gain insight into personal communication tendencies and learn to use this awareness intentionally to build trust, influence, and strategic alliances.
- Practise interacting with other DiSC® style profiles to strengthen collaboration, reduce friction, and achieve team synergy.

Simulation activities include:
- Role-playing.
- Analysis of individual communication style.
- Case study in groups and individually.
- Hands-on practice in adapting communication strategies when engaging with representatives of different DiSC® styles.

Feedback

Participants receive structured feedback and targeted development guidance on the following leadership skills which are observed during the simulations:
- Communication Under Pressure.
- Decision-Making & Critical Thinking.
- Stakeholder Management.
- Stress and Emotional Intelligence.

Module 2 | Mergers & Acquisitions – Strategy and Deal Mechanics

In this module, participants step into the strategic role of deal architect, evaluating acquisition opportunities, leading negotiations, and defending investment decisions under board scrutiny.

Technical Skills

Participants will:

- Define the strategic rationale for the acquisition and articulate how a target enhances the company's competitive advantage and ensures enterprise long-term value.
- Assess value drivers, synergies and strategic fit to determine whether a proposed deal delivers sustainable growth and returns above the company's WACC.
- Lead deal structuring and financing decisions to optimise value creation, manage risk, and support the organisation's long-term strategy.
- Oversee integration planning to protect synergies, maintain business continuity, and ensure cultural alignment.

Simulation activities include:

- Negotiation with sellers.
- Due-diligence deep dives.
- Presenting the investment thesis to the BoD.
- Debating synergies and integration risks with sceptical stakeholders

Leadership Skills

Participants will:

- Be introduced to essential persuasion and influencing techniques, along with the 16 intrinsic motivation factors based on the Reiss Motivation Profile® developed by Steven Reiss.
- Learn how to apply this knowledge both to their own development and to increasing their effectiveness when influencing and collaborating with others.
- Practise applying persuasion techniques and influence principles across different motivational profiles.

Simulation activities include:

- Negotiating.
- Analysis of individual motivation profile.
- Case study in groups and individually.

Feedback

Participants receive structured feedback and targeted development guidance on the following leadership skills which are observed during the simulations:

- Negotiation & Persuasion:
  - Multi-party negotiation simulations (buyer/seller/advisors).
  - Managing emotions and hidden agendas.
  - Anchoring, framing, and influencing strategies.
- Analytical Storytelling:
  - Communicating a valuation story, not just numbers.
  - Turning DD findings into a compelling narrative.

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Module 3 | Advanced Investment Appraisal and Capital Structure

In the final module, participants act as strategic capital allocators, challenging investment proposals, shaping funding strategy, and balancing risk, growth, and shareholder expectations.

Technical Skills

Participants will:

- Evaluate investments through a strategic lens, balancing financial returns with competitive positioning capital constraints and long-term value creation.
- Interpret complex modelling outputs (WACC, APV, scenarios) to inform executive decision-making and capital allocation.
- Critically challenge business cases and ensure assumptions reflect realistic market conditions and executable business plans.
- Shape capital structure and funding decisions to support sustainable growth, financial resilience and shareholder expectations.

Simulation activities include:

- Assessing a complex project based on Adjusted Present Value and real options (delays, abandonment, growth expansion).
- Suggesting Capital structure and funding alternatives to the BoD.

Leadership Skills

Participants will:

- Develop an understanding of creativity as a practical mindset that supports analytical thinking and effective business decision-making.
- Apply proven tools and methods for generating innovative ideas and enabling teams to move beyond conventional thinking patterns.
- Gain familiarity with structured problem-solving and process improvement tools, including Brainstorming, the Ishikawa (Fishbone) Diagram, 5-Why Analysis, and SIPOC.

Simulation activities include:

- Interactive exercises designed to stimulate creative thinking and encourage collaboration.
- A case study in which participants apply creativity and problem-solving tools to a real-life business challenge.
- Practical application of process optimization techniques using Lean management tools.

Feedback

Participants receive structured feedback and targeted development guidance on the following leadership skills which are observed during the simulations:

- Strategic Thinking & Executive Presence.
- Challenging & Being Challenged.
- Creativity & Innovation.

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Trainers

Marinos Athanassiou

Marinos is the founder of the EY Academy of Business and has been a professional trainer since 1994, with deep expertise in finance and accounting rooted in his background in audit, CFO experience, and economics education. He designs and leads courses on practical applied finance programmes and delivers training in social skills such as effective leadership and team communication in business contexts.

Kamil Brzózka

DiSC, RMP, FACET5, MTQ48, CSM

With over 15 years experience in multinational corporations, Kamil combines business experience with creative, original solutions in the area of soft skills. He always places the participants of workshops and meetings in the centre of events, creating a space for the exchange of experiences and checking the transferred knowledge in practice.

George Skordis

FCCA, ACIB

George is an Associate Senior Trainer at the Academy with over 20 years of experience in professional education, combining senior finance leadership roles with international training. His expertise lies in finance and accounting areas such as IFRS, strategic financial management, risk management, corporate finance and M&A, and he delivers practical executive-level training programmes to professionals across regions.

Contact

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