

FINANCE DEPARTMENT DIGITAL TRANSFORMATION & WORKFLOW INTEGRATION



25th 29th JANUARY 2026

W Hotel, Doha.

COURSE OVERVIEW

This program is designed to equip finance professionals with the knowledge and strategies to transform traditional, siloed finance operations into a digitally integrated, high-performing function.

Participants will explore modern workflow designs, collaboration techniques, and process automation concepts to streamline daily activities while improving accuracy, efficiency, and strategic impact.

The course emphasizes end-to-end process transformation, covering everything from transaction processing to real-time reporting and analytics. By reducing manual work and inefficiencies, finance teams will be empowered to focus on higher-value activities such as performance analysis, forecasting, and business partnering.

KEY FOCUS AREAS INCLUDE:

- Building a digitally connected finance ecosystem that links budgeting, reporting, and operational data for real-time insights.
- Designing workflows that break down silos and enable seamless collaboration across teams and departments.
- Embedding governance, compliance, and audit readiness within automated processes for enhanced transparency and control.
- Preparing the finance function to act as a strategic advisor, delivering timely, data-driven insights to support executive decision-making.
- Identifying opportunities for continuous improvement to keep pace with evolving business needs and external regulations.

By the end of this program, participants will have a practical roadmap to modernize their finance departments, boost operational efficiency, and provide actionable insights that drive organizational growth and resilience in a rapidly changing business environment.



WHO SHOULD ATTEND

Finance managers, controllers, analysts, and senior finance leaders seeking to transform their department into a digital, collaborative, and data-driven unit.

LEARNING OUTCOMES

By the end of the program, participants will:

- Understand modern workflow structures for finance functions.
- Develop strategies for integrating digital tools and reporting systems.
- Design transparent and efficient processes for approvals and controls.
- Align finance processes with strategic business goals.

5-DAY PROGRAM AGENDA

DAY 1: FOUNDATIONS OF FINANCE DIGITAL TRANSFORMATION

Main Topics:

1. Understanding the Modern Finance Function

- o Evolution of finance from record-keeping to strategic driver.
- o Key pain points in traditional finance departments.
- o Digital transformation roadmap overview.

2. Core Concepts of Process Digitization

- o Difference between digitization, digitalization, and transformation.
- o Identifying processes for automation vs. optimization.
- o Key metrics for finance efficiency (cycle time, cost per transaction, error rates).

Subtopics:

- o Role of finance in overall organizational strategy.
- o Global trends shaping modern finance (compliance, analytics, AI).
- o Real-world examples of successful digital finance transformations.

DAY 2: PROCESS MAPPING AND WORKFLOW DESIGN

Main Topics:

1. Mapping the Finance Workflow

- o Tools for visualizing processes (e.g., flowcharts, swimlane diagrams).
- o Identifying bottlenecks and inefficiencies.
- o Cross-functional process mapping between finance, procurement, and operations.

2. Designing Scalable Workflows

- o Approval hierarchies and segregation of duties.
- o Workflow standardization vs. customization.
- o Building controls into the workflow.

Subtopics:

- o Examples of typical finance workflows (AP, AR, payroll, expense management).
- o Key considerations for integrating regulatory and compliance steps into workflows.
- o Hands-on mini-exercise: map a simple approval process.

DAY 3: AUTOMATION AND INTEGRATION ACROSS FUNCTIONS

Main Topics:

1. Automation Fundamentals

- o Types of automation: robotic process automation (RPA), rule-based, and AI-driven.
- o Identifying processes most suitable for automation.
- o Steps to pilot and scale automation.

2. System Integration for End-to-End Efficiency

- o Linking finance systems with HR, procurement, and sales data.
- o Importance of data consistency and avoiding silos.
- o Managing integration projects: stakeholders, timeline, risks.

Subtopics:

- o Realistic examples of finance automation such as invoice processing and reconciliations.
- o Discussion of risks like over-reliance on technology.
- o Group activity: identify one process for automation in a hypothetical organization.

DAY 4: DATA-DRIVEN DECISION MAKING AND ANALYTICS

Main Topics:

1. Building a Finance Analytics Culture

- o Moving from backward-looking reports to predictive analytics.
- o Essential KPIs for finance leaders.
- o Role of dashboards and visualization tools.

2. Scenario Planning and Forecasting

- o Using data to simulate business scenarios.
- o Linking operational metrics to financial performance.
- o Hands-on demonstration with simple case study data.

Subtopics:

- o How clean data drives accurate decision-making.
- o Translating analytics into actionable decisions.
- o Case discussion: comparing two forecasting approaches.

DAY 5: IMPLEMENTATION STRATEGY AND CHANGE MANAGEMENT

Main Topics:

1. Strategic Roadmap for Digital Transformation

- o Phased implementation: quick wins vs. long-term goals.
- o Governance structures for ongoing success.
- o Risk management and compliance considerations.

2. Managing People and Change

- o Overcoming resistance to new tools and processes.
- o Training and upskilling finance teams.
- o Building a culture of innovation and accountability.

Subtopics:

- o Role of leadership in driving transformation.
- o Best practices for communicating change to stakeholders.
- o Wrap-up workshop: participants create a basic roadmap for their organization.

TRAINER'S PROFILE

Peter Bokma, mba

Strategy Provider - Senior Treasury
Consultant



With over 45 years of experience at the intersection of international Treasury and Investment Banking Consulting, Peter has developed a comprehensive and nuanced expertise across both conventional and Islamic treasury environments. His career has been marked by the development of advanced trading models that have become foundational to innovative trading strategies. Through detailed portfolio analysis, he has enhanced asset performance and brought precision to asset allocations.

A key achievement in my career has been the successful implementation of four full-cycle treasury systems. These projects have strengthened operational resilience and streamlined financial processes, leading to quicker and more efficient transactions. He has played a pivotal role in driving significant changes within globally renowned firms, making lasting impacts in regions including Europe, Australia, Singapore, the USA, Qatar, and Saudi Arabia.

His skills as a sophisticated commercial strategist are backed by a track record of significant bottom-line achievements. He excels in motivating and challenging teams, aiming for an operational framework that emphasizes high performance and innovation. His expertise lies in business requirement analysis, Treasury, and Investment Control setups.

Recognized for my reliability and effectiveness, I have consistently excelled in challenging commercial environments. His communication skills and negotiation abilities enable me to drive strategic transformations, fostering continuous improvement and operational excellence.

In addition to his professional skills, he is multilingual, fluent in Dutch, English, German, and proficient in conversational French, with a basic understanding of Tagalog. My extensive training background covers experiences in the United States, further enriching my global perspective.

Additionally, he has provided consultancy and training to prestigious clients such as Commerzbank, ING Bank and Group, ABN Amro, Arab Banking Corp, KIPCO, Qatar Intl Islamic Bank,

Qatar Internal Islamic Bank, ARAMCO, Nakilat, HSBC, Gulf International Bank, and many others, either through his network of event management organizations or directly. This diverse client base reflects the breadth and depth of my expertise and the wide-reaching impact of his work in the field.

FINANCE DEPARTMENT DIGITAL TRANSFORMATION & WORKFLOW INTEGRATION

25th - 29th JANUARY 2026

W Hotel, Doha.

FOR REGISTRATION PLEASE COMPLETE THIS FORM AND EMAIL BACK TO
MUHAMMAD SAAD

EMAIL: SAAD@GIINTELLIGENCE.COM | TEL : +44 20 4525 8028

REGISTRATION DETAILS

NAME

JOB TITLE

MOBILE NUMBER

EMAIL

NAME

JOB TITLE

MOBILE NUMBER

EMAIL

NAME

JOB TITLE

MOBILE NUMBER

EMAIL

ORGANISATION

ADDRESS

TOWN

COUNTRY

PHONE

STATE

POSTAL CODE

FAX

NATURE OF BUSINESS

REGISTRATION FEE:

Book and Pay till 25 December, 2025 @GBP 3995/person

Book and Pay after 25 December, 2025 @GBP 4595/person

AUTHORIZATION:

Signature _____ Date _____

Name _____ Position _____

THIS BOOKING IS INVALID WITHOUT A SIGNATURE.

AUTHORIZATION SIGNATORY MUST BE AUTHORIZED TO SIGN ON BEHALF
OF CONTRACTING ORGANISATION

