

BUSFIN 7211: FP&A and Forecasting/Budgeting Management

Professor Chad Zipfel (zipfel.4@osu.edu)

Spring 2026 Tues/Thurs Second Session 4:30 to 6pm Gerlach 305.

Office Hours on appointment or Tues/Thurs 9am to 11am.

1.) Course Description

The course shares how FP&A (financial planning and analysis) can create value for an organization, with a focus on key forecasting and budgeting processes that can be applied across industries and business cycles. The audience is working Finance professionals, and other functions who aspire for general management roles. It leverages best practices across industries so students become aware of how their role fits with the company business planning cycle, and allows them to apply what they are learning via team case studies and simulations.

2.) Course Material

Material will leverage industry best practices and be posted on Carmen ahead of class.

Required: Follow this link and it will walk you through the steps to set up an account to purchase the Harvard Business Publishing packet (use osu.edu email): <https://hbsp.harvard.edu/import/1392733>

Recommended: Access monthly WSJ subscription for free: <https://education.wsj.com/search-students/>

3.) Course Prerequisites

BusFin 6223 or other demonstrated understanding of core finance concepts

4.) Class Format

This 7-week format will move quickly. It is important to be prepared and have the mental/physical energy to stay engaged late in the afternoon. You will be expected to complete 3-4 hours of work outside of class each week.

While we will have lecture, majority of your learning will come from application and discussion. Case and Simulation based courses have a very different class format from other courses you may have taken prior. In other courses, students are engaged in a passive form of learning and are expected to learn and practice skills through homework and exams. Courses that utilize the “case study” method assume an active form by students. The following four principles are ESSENTIAL components of a student’s success in a case course:

- **Participation:** Learning in a case course takes place primarily through active class participation. Students are strongly encouraged and are responsible for sharing their understanding and views on each case with the rest of the class. As you can tell from the grade composition, class participation and your peer assessment comprise a material portion of your course grade.

- **Preparation:** To effectively participate in class discussion of cases, students MUST come to class well prepared. Students should study each assigned case in advance, identify the main participants and the problem(s) faced, and prepare to ask and answer questions. It is very important that you work to analyze the case before it is discussed in class. You must be prepared to offer your judgment and recommendation for the situation presented in each case. You should feel free set up an appointment, if you need help with preparing for a case. In addition, you should read any assigned background readings.

- **Presence:** The only way to learn and succeed in this course is to be present and participate in each and every class. Reading a text or copying notes from your fellow students CANNOT substitute for the insight and knowledge that you will acquire through participation in class discussions.

- **Promptness:** Students must make sure that they arrive before the beginning of each class. Students who arrive to class late disrupt the discussion and impose a burden on their fellow students' learning experience. If, for some reason, you happen to arrive to class late, please enter quietly and do not disturb your fellow students.

It is clear from the above that students must make a commitment to prepare for each class and actively participate in class discussions. You are strongly encouraged to take a stand and offer your analysis and recommendations for action. Remember, case studies describe real-world business situations. There is typically more than one course of action to take. It is not as important to discover which particular action will eventually be taken as it is to learn to provide a recommendation based on financial principles and solid analysis.

5.) Grading Procedures (see class schedule at end of syllabus for timing)

	<u>Graded Item</u>	<u>Percent</u>	<u>Points</u>
Solo	Pre-Work Review	5%	10
Solo	Guest Lecture Prep/Recap	11%	20
Solo	Semester Engagement	16%	30
Solo	Biz Memo	11%	20
Team	Group KPI Scorecard Simulation	16%	30
Team	Group IR Presentation	11%	20
Team	Group P/L and Cash Fcst	16%	30
Team	Capstone Simulation	16%	30
	Total	100.0%	190

<u>Letter Grade</u>	<u>Range:</u>	
A	100 %	to 93.0%
A-	< 93.0 %	to 90.0%
B+	< 90.0 %	to 87.0%
B	< 87.0 %	to 83.0%
B-	< 83.0 %	to 80.0%
C+	< 80.0 %	to 77.0%
C	< 77.0 %	to 73.0%
C-	< 73.0 %	to 70.0%
D+	< 70.0 %	to 67.0%
D	< 67.0 %	to 60.0%

- **Quality Engagement**

Participation in class discussions of cases and asking questions during class will be monitored (roughly 5 points each session). In addition, your teammates will provide a peer assessment at end of the course which will help influence your overall total (out of 30 points).

- **Reflections**

You will be asked to read/review content prior to class and come prepared to discuss. To help with this, you will need to complete a reflection, answering thought provoking questions intended to help you solidify your understanding of material ahead of that day's class.

- **Case Studies/Simulations**

For case discussions and simulations, you will be given preparation questions to help guide your analysis. At a minimum, you should address the study questions prior to class, but I encourage you to think about relevant issues beyond the questions in the guidelines. The case grade reflects both your preparation of the case materials and your participation in the case discussion. You will submit your case brief to Carmen by the published due date.

You will be randomly assigned groups (via Carmen) so that you can work together, brainstorm ideas, and deliver a better end-product. It is important for you to communicate regularly. One upload submission group is required in Carmen. At the end of the semester, you will be required to complete a simple peer feedback assessment (shared only with professors). You will grade your teammates as "above", "meeting", or "below" expectations for the case studies/simulations in the course.

6.) Course Policies

- **Professionalism**

Professionalism includes arriving on time and prepared, asking thoughtful questions, answering questions, and contributing to a positive classroom environment. For those remote, we will be using the Zoom interface which will be a similar experience to what you face in Company meetings.

- **Course website**

We will maintain a website through Carmen. The URL is <https://carmen.osu.edu>. We will use the website to post course slides, articles, recorded lectures, case preparation questions, etc. It is important that you check it regularly and have notifications “turned on” for when announcements are made and/or the course is modified.

- **Grade Change Policy**

Grade appeals must be emailed **within one week** after the graded work is made available. The entire document will be checked for grading errors, and correcting these could either **raise** or **lower** the overall score.

- **Academic Integrity Policy**

Academic integrity is essential to maintaining an environment that fosters excellence in teaching, research, and other educational and scholarly activities. Thus, The Ohio State University and the Committee on Academic Misconduct (COAM) expect that all students have read and understand the university’s Code of Student Conduct, and that all students will complete all academic and scholarly assignments with fairness and honesty. Students must recognize that failure to follow the rules and guidelines established in the university’s Code of Student Conduct and this syllabus may constitute “Academic Misconduct.”

The Ohio State University’s Code of Student Conduct (Section 3335-23-04) defines academic misconduct as: “Any activity that tends to compromise the academic integrity of the university or subvert the educational process.” Examples of academic misconduct include (but are not limited to) plagiarism, collusion (unauthorized collaboration), copying the work of another student, and possession of unauthorized materials during an examination. Ignorance of the university’s Code of Student Conduct is never considered an excuse for academic misconduct, so we recommend that you review the Code of Student Conduct and, specifically, the sections dealing with academic misconduct.

If we suspect that a student has committed academic misconduct in this course, we are obligated by university rules to report suspicions to the Committee on Academic Misconduct. If COAM determines that you have violated the university’s Code of Student Conduct (i.e., committed academic misconduct), the sanctions for the misconduct could include a failing grade in this course and suspension or dismissal from the university.

If you have any questions about the above policy or what constitutes academic misconduct in this course, please contact us.

Other sources of information on academic misconduct (integrity) to which you can refer include:

- The Committee on Academic Misconduct web pages (COAM Home)
- Ten Suggestions for Preserving Academic Integrity (Ten Suggestions)
- Eight Cardinal Rules of Academic Integrity (www.northwestern.edu/uacc/8cards.htm)

- **Office of Disability Services (ODS)**

Any student who feels s/he may need an accommodation based on the impact of a disability should contact me privately to discuss his/her specific needs. Please contact the Office for Disability Services at 614-292-3307 in room 150 Pomerene Hall to coordinate reasonable accommodations for students with documented disabilities.

7.) Tentative Class Schedule (see next page)

The course syllabus is a general plan for the course; deviations announced to the class may be necessary.

BusFin 7211 SP26 Class Schedule (Tues/Thurs)

Red Indicates Graded Assignment

Week of	Week #	Topic	Tues	Thurs
2-Mar-26	1	Intro and Expectations		Intro to Class, Set-up, Expectations <i>Pre-Work Review</i>
9-Mar-26	2	FP&A Overview	FP&A Operating Rhythm <i>Group IR Exercise Present</i>	Executive Memos and KPI Thinking
16-Mar-26	3	Spring Break	<i>No Class</i>	<i>No Class</i>
23-Mar-26	4	Building a Model	Driver Based Budgeting <i>Memo Sharing (select 3)</i>	<i>Guest Speaker:</i> <i>Neeraj Dashputra CFO</i>
30-Mar-26	5	Pressure Test the Forecast	P/L Forecasting <i>Group Fcst Diagnostic</i>	Bridging to Cash Flow - NWC <i>Revisit the Fcst (13k CF)</i>
6-Apr-26	6	Performance Management	Performance Measurement / Compensation Systems	<i>KPI Scorecard Simulation</i>
13-Apr-26	7	Driving Action to Steer the Business	Debrief Simulation Lessons from in the Trenches	<i>Guest Speaker:</i> <i>Matt Garth CFO</i>
20-Apr-26	8	Final Group Analysis/Presentations	<i>Capstone Simulation:</i> <i>Qtrs 1-2 In Class</i>	<i>Capstone Simulation:</i> <i>Qtrs 5-6 In Class</i>
27-Apr-26	9	Submit Analysis and Reflection		<i>Final Package Due During Finals</i> <i>Week</i>