



Financial Analysis Tools and Techniques: A Guide for Managers

By Erich A. Helfert



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Praise for *Financial Analysis Tools and Techniques*:

"Bona fide treasury for executives, managers, entrepreneurs. Have long used this great work in corporate & university programs. Uniquely makes the arcane clear." Allen B. Barnes, Provost, IBM Advanced Business Institute

"A candidate for every consultant-to-management's bookshelf. Its beauty lies in the dynamic model of the business system and its management decision framework." Stanley Press CMC, Book review in *C2M Consulting to Management Journal*

"Goes a long way to remove the mystery from business finance. Approach allows managers from all areas to understand how their decisions impact shareholder value." Stephen E. Frank, Chairman and Chief Executive Officer, Southern California Edison

"Helfert has rare ability to make financial concepts understandable to those lacking financial background. His finance seminars exceeded our high expectations." L. Pendleton Siegel, Chairman and Chief Executive Officer, Potlatch Corporation

"Commend the clarity, organization and currency of contents. There is no other book available that does the task in such an understandable and accessible way." - Dr. Thomas F. Hawk, Frostburg State University

"Helfert's excellent overviews and simplified models effectively broadened our managers' understanding of their fiscal responsibility to HP and our shareholders." Robert P. Wayman, Executive Vice President, Chief Financial Officer, Hewlett-Packard Company

"The book has become a classic, and Helfert has been of substantial help to my company in teaching our people how to think about the numbers which drive it." - Robert J. Saldich, President and Chief Executive Officer, Raychem Corporation

"Helfert has contributed to the development of financial skills of TRW managers through his book, case studies and presentations, and highly rated instruction." -

Peter S. Hellman, President and Chief Operating Officer, TRW Inc.

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"Helfert's writing and teaching have become a mainstay for us, and his business and strategic sense have been recognized as valuable guides to our process."- William H. Clover, Ph.D., Manager of Training, and AMOCO Learning Center

Concepts and tools for making sound business decisions

Financial Analysis Tools and Techniques, a business-focused revision of Erich Helfert's perennial college bestseller *Techniques of Financial Analysis*, is a quick, easy read for nonfinancial managers and an excellent refresher and reference for finance professionals. This practical, hands-on guide provides a new introductory chapter that gives context to today's valuation turmoil and helps professionals understand the economic drivers of a business and the importance of cash flow.

The book's overriding theme is that any business should be viewed as a dynamic, integrated system of cash flowsone that can be activated and managed by investment decisions. Topics, discussed in clear, comprehensive, and easy-to-understand detail, include:

- Increasing shareholder value through value-based management (VBM)
- Interpreting pro forma financial statements

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Financial Analysis Tools and Techniques: A Guide for Managers By Erich A. Helfert Bibliography

- Rank: #1042874 in eBooks
- Published on: 2001-11-20
- Released on: 2001-11-20
- Format: Kindle eBook

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Editorial Review

From the Back Cover

Proven Techniques for All Managers and Financial Professionals to Generate, Understand, and Act Upon Key Financial Information

The syntax and "code" of financial analysis, along with the avenues for arriving at appropriate and useful answers, have long seemed like a foreign language to nonfinancial managers. *Financial Analysis Tools and Techniques* simplifies the process, and provides busy managers and professionals with the guidelines they need for conducting effective analyses and making sound economic trade-offs and business decisions.

In a business systems context, this essential book explains how to:

- Interpret financial statements
- Develop financial projections
- Evaluate business investment decisions
- Assess the implications of financing choices
- Derive the value of a business or security
- Understand the role of analysis in creating shareholder value

Financial Genome by Modernsoft, Inc.

This advanced knowledge-based business analysis and planning software is fully integrated with this book, allowing users to:

- Access data from databases, spreadsheets, user input
- Develop free-form or structured analyses with consistency
- Produce a wide variety of customizable financial statements
- Create integrated financial pro-forma projections

Download *Financial Genome* for a free 30-day trial from www.modernsoft.com (See Appendix I for details)

Since the first of its ten editions appeared in 1963, Erich Helfert's seminal *Techniques of Financial Analysis* has provided business students as well as financial practitioners with a concise and practical overview of financial analysis tools and concepts. What sets this classic text apart then, and continues to distinguish it today, has been its focus on the continuous interrelationship between management decisions and the economic value of a business, explained in a unique systems context.

Financial Analysis: Tools and Techniques adapts this seminal reference to today's fast-changing professional market and establishes a new benchmark for direct, concise, and practical financial analysis information and interpretation. Specifically addressing key analytical needs in the tumultuous twenty-first-century business environment, it comments on valuable business applications of the tools and concepts with insights from Erich Helfert and his consulting clients.

Providing focused analyses of the economics of business investments and valuation, presenting discussions of cash-flow trade-offs and time-value analysis against the strategic backdrop of the business system, and

emphasizing enhancement of shareholder value through value-based management (VBM), *Financial Analysis: Tools and Techniques* will help all nonfinancial managers to make sound investment, operating, and financing decisions. Concise yet sufficiently detailed, it covers the full range of financial analysis issues, including:

- Managing the business as a system
- Financial statements
- Funds cycles for manufacturing, sales, and service
- Cash management
- Ratio analysis and performance
- Pro-forma financial statements
- Financial modeling
- Leverage
- Financial growth plans
- Time value of money
- Analysis of investment decisions
- Using return standards
- Cost of capital
- Financing choices
- Definitions of value
- Shareholder value and value-based methodologies

Financial Analysis: Tools and Techniques is a quick and easy read for the nonfinancial manager and an excellent refresher and reference for the financial professional. In conjunction with its companion software *Financial Genome*, it represents the next step in financial analysisone that gives financial analysis and economic decisions their proper importance and context in the successful operation of a business.

About the Author

Erich A. Helfert, DBA, is an internationally recognized management consultant in corporate finance, strategic planning, and executive education in financial/economic decision making and value creation. The cofounder, chairman, and CEO of Modernsoft, Inc.developers of the knowledge-based financial analysis and business modeling software *Financial Genome*Dr. Helfert is the former corporate planning vice president at Crown Zellerbach Corporation, and previously was a faculty member of the Harvard Business School. He is the author of all ten editions of the best-selling college text *Techniques of Financial Analysis*.

Users Review

From reader reviews:

Curtis Tyson:

The feeling that you get from *Financial Analysis Tools and Techniques: A Guide for Managers* is a more deep you rooting the information that hide in the words the more you get enthusiastic about reading it. It doesn't mean that this book is hard to be aware of but *Financial Analysis Tools and Techniques: A Guide for Managers* giving you joy feeling of reading. The author conveys their point in specific way that can be understood by simply anyone who read this because the author of this guide is well-known enough. That book also makes your current vocabulary increase well. Therefore it is easy to understand then can go along, both in printed or e-book style are available. We highly recommend you for having this kind of Financial

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Patsy Locke:

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