

# Presenting Information Effectively to Finance Professionals

Essential Competencies for Professional Growth

## Introduction

You will gain the essential skills to use sophisticated data analysis and interpretation techniques as the foundation for perceptive business dashboards, reports, and presentations to senior managers, decision-makers, and colleagues in the financial and non-financial sectors during this Course N Carry Presenting Information Effectively to Finance Professionals training course.

Even though you may be an expert in Excel spreadsheets and have highly developed accounting and finance skills, in today's fiercely competitive job market, those qualities won't be enough to propel you from the accounting department into the boardroom where the real decision-makers sit. The most compelling finance directors and CFOs gain a seat "at the top table" by developing the abilities and strategies required to analyse and present financial data in a way that offers and efficiently conveys valuable business insights that direct the organization's most important strategic decision-makers.

### **This training session on Course N Carry will emphasise:**

- Methods for utilising analytics and business intelligence
- How to transform financial information into insightful business knowledge
- Incorporating critical performance metrics, including financial ones
- How to use PowerPoint and Excel to create effective presentations
- Recognising and satisfying your audience's demands
- Excellent advice for creating financial presentations that have an actual impact
- How to steer clear of the most frequent faults and errors in presentations

## Objectives

How to organise, prepare, and deliver financial presentations that have a genuine impact on internal and external audiences is explained and practically shown in the Course N Carry Presenting Information Effectively to Finance Professionals training course.

**Following completion of this Course N Carry training programme, learners will be able to:**

- Make the most of Business Intelligence (BI) and Business Analytics (BA)
- Utilise Excel's robust analysis features to create dashboards
- Utilise PowerPoint and Excel to create lucid reports and business insights.
- Integrate financial and non-financial performance metrics successfully
- When presenting financial information, take the audience's demands into consideration.
- Utilise the tried-and-true guidelines for clear communication to convey your point.
- Deliver presentations to internal and external audiences that have a genuine impact.
- In your presentations, respond to demanding inquiries and participants.

## **Training Methodology**

Using case studies and real-world examples, this Course N Carry Presenting Information Effectively to Finance Professionals training course is delivered in a highly interactive workshop format. In addition to practicing financial presentation preparation in a secure setting, participants will get the chance to hone their practical presentation skills. Additionally, it offers real-world, hands-on exercises that show how to use PowerPoint and Excel for presentations.

## **Organizational impacts**

**The development and implementation of Finance talents and skills will benefit the company in crucial areas such as maximising the use of BI and BA systems, generating business insights, and interacting with and assisting important decision-makers inside the organisation. Specifically, advantages will include:**

- Enhanced application of BA methods and BI systems
- Utilising important business performance metrics more often
- Improved financial data interpretation and presentation yields more important company insights.
- Improved alignment between performance metrics that are financial and non-financial
- Improvements in the Finance team's professionalism and communication abilities as well as the human talent pool for internal succession planning
- Improved communication with stakeholders, both internal and external

## **Personal Impact**

**In order to effectively communicate with non-financial managers and present them with financial information, participants will acquire the theoretical knowledge and practical skills listed below.**

- Capacity to capitalise on advancements in BI and BA Expertise in the quick creation of Excel dashboards
- How to connect financial metrics to strategic objectives of the company
- Making presentations that meet professional standards with Powerpoint and Excel
- How to interact with non-financial managers in a successful manner
- Creating and producing impactful business reports
- Organising and delivering presentations with assurance
- Recognising audiences and answering challenging inquiries

## Who should attend?

The foundation of successful performance management is the effective dissemination of critical financial insights, so everyone involved in the organization's accounting and finance departments should be present.

**A suitable variety of professionals are enrolled in this Course N Carry training session, and they will greatly benefit from:**

- Auditors of Taxes
- Analysts of investments and taxation
- Senior Managers of Finance
- Managers of Strategic Planning and Management Accounting
- Managers of Planning and Budgeting
- Managers of Mergers and Acquisitions
- Members of the project team and capital investment
- Chief Financial Officers and Directors of Finance

## Course Outline

### Day 1

#### Fundamentals of Financial Interpretation and Analysis

- A Realistic Method for Financial Analysis
- Comprehending the Financial Information's Strategic Context
- Financial Ratio Calculation and Interpretation
- Fundamentals of Business Analytics and Business Intelligence Using Excel Data Analytics Techniques
- Using Predictive Analytics to Enhance Financial Projections
- Why is finance so hard for managers who aren't in finance?

### Day 2

## **Including Critical Performance Indicators**

- Finding Organisational Key Performance Indicators (KPIs) through the Use of an Effective Performance Management Framework
- Recognising and Applying Balanced Scorecards
- The Integrated Reporting Principles
- Making Use of Excel's Advanced Data Analysis Features
- Creating, Developing, and Utilising Excel Dashboards

## **Day 3**

### **Getting Ready for an Accounting Demonstration**

- How can I successfully communicate important topics in finance?
- Essentials of Business Insight and Financial Interpretation
- Guidelines and Practices for Effective Data Visualisation Creating Impactful Graphics with Excel Reports for Readers Who Are Not Financial
- Preventing Typical Errors in the Presentation of Financial Data

## **Day 4**

### **Organising a Financial Showcase**

- The Fundamentals of Powerful Communication
- Overcoming Typical Obstacles to Effective Communication
- Recognising Your Audience's Requirements
- Making the Most of PowerPoint: Using Excel Tables and Graphics in PowerPoint
- Making Professional Presentations with PowerPoint
- Creating a Successful Financial Presentation

## **Day 5**

### **Making a Successful Financial Presentation**

- How can a financial report be written effectively?
- Preventing Typical Presentation Errors
- Advice on Giving an Outstanding Presentation
- Controlling Anxiety and Putting Up a Professional Front Taking Hard Questions
- Organising Conferences and Attendees