

Course Name

Effective Presentation Skills for Finance Professionals

Sector Name

Interpersonal Skills and Self Development

Document Type

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Effective Presentation Skills for Finance Professionals

Course Introduction

The finance industry is continuously evolving, and that means that professionals in this field must also develop their skills to keep up with that transformation.

They may have an in-depth knowledge and skills in accounting and Excel proficiency, but it is also critical that they know how to deliver the content of their reports and connect with others across multiple departments.

This training course is designed to provide finance professionals with the essential knowledge and skills necessary for them to effectively present and communicate financial information to others, such as superiors or other departments.

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Effective Presentation Skills for Finance Professionals

Target Audience

This training course is designed to finance professionals seeking to upscale their presentation skills and expertise.

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Learning Objectives

- ✓ Gain a comprehensive understanding of the principles of financial analysis and interpretation.
- ✓ Recognize and understand audience needs when making financial presentations
- ✓ Learn Excel's powerful analysis functions to develop dashboards
- ✓ Discover the potential of Business Intelligence (BI) and Analytics (BA)
- ✓ Prepare clear reports and business insights using Excel and PowerPoint
- ✓ Know how to integrate financial and non-financial performance measures
- ✓ Apply the proven rules of effective communication to get the message across
- ✓ Effectively deliver presentations with real impact to internal and external audiences
- ✓ Handle difficult questions and challenging people in your presentations

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Course Outline

✓ **01 Day One**

Introduction to Financial Analysis and Interpretation

- ✓ A Practical Approach to Financial Analysis
- ✓ Understanding the Strategic Context for Financial Information
- ✓ Calculating and Interpreting Financial Ratios
- ✓ Principles of Business Intelligence and Business Analytics
- ✓ Using Data Analytics Techniques in Excel
- ✓ Predictive Analytics - Improving Financial Forecasts
- ✓ Why do non-financial managers find finance difficult?

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Course Outline

✓ 02 Day Two

Integrating KPI Measures

- ✓ Using an Effective Performance Management Framework
- ✓ Identifying Organisational Key Performance Indicators (KPI's)
- ✓ Understanding and Using a Balanced Scorecard
- ✓ The Principles of Integrated Reporting <IR>
- ✓ Exploiting Excel's Advanced Data Analysis Functions
- ✓ Designing, Building, and Using Dashboards in Excel

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Course Outline

✓ **03 Day Three**

Financial Presentation Preparation

- ✓ How to communicate key finance concepts effectively?
- ✓ Fundamentals of Financial Interpretation and Business Insight
- ✓ Principles and Practice for Effective Data Visualisation
- ✓ Using Excel to Produce Graphics with Impact
- ✓ Designing Excel Reports for Non-financial Readers
- ✓ Avoiding Common Mistakes in Presenting Financial Information

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Course Outline

✓ **04 Day Four**

Financial Presentation Planning

- ✓ The Principles of Effective Communication
- ✓ Dealing with Common Barriers to Effective Communication
- ✓ Understanding Your Audience and Their Needs
- ✓ Getting the Best Out of PowerPoint
- ✓ Incorporating Graphics and Excel Tables in PowerPoint
- ✓ Using PowerPoint to Produce Professional Presentations
- ✓ Designing a Winning Financial Presentation

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Course Outline

✓ 05 Day Five

Delivering a Financial Presentation

- ✓ How to write an effective financial report?
- ✓ Avoiding Common Mistakes in Presentations
- ✓ Tips for Delivering a Knock-out Presentation
- ✓ Managing Nerves and Presenting like a Professional
- ✓ Handling Difficult Questions
- ✓ Managing Meetings and Audiences

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Confirmed Sessions

FROM	TO	DURATION	FEES	LOCATION
March 15, 2027	March 19, 2027	5 days	4950.00 \$	England , London
July 26, 2027	July 30, 2027	5 days	4250.00 \$	UAE , Abu Dhabi
Oct. 11, 2026	Oct. 15, 2026	5 days	4250.00 \$	KSA , Riyadh
April 26, 2027	April 30, 2027	5 days	4250.00 \$	UAE , Dubai

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