

# Effective Presentation Skills for Finance Professionals

## INTRODUCTION

- This Effective Presentation Skills for Finance Professionals training course will provide you with the key skills to use advanced data analysis and interpretation techniques as the basis for insightful business dashboards, reports, and presentations to financial and non-financial colleagues, senior managers, and decision-makers.
- You may have highly developed finance and accounting skills; you might be the master of the Excel spreadsheet – but in today's highly competitive work environment, those talents will not by themselves be enough to get you out of the accounting office and into the boardroom with the real decision-makers. The most persuasive CFO's and Finance Directors earn their place "at the top table" by mastering the skills and techniques needed to interpret and communicate financial information in a way that provides and effectively communicates meaningful business insights that guide the organisation's key strategic decision-makers.

This training course will highlight:

- Techniques to exploit the power of Business Intelligence and Analytics
- How to convert financial data into meaningful business insights
- Integrating financial and other key performance measures
- How to harness Excel and Powerpoint for making winning presentations
- Understanding and meeting the needs of your audience
- Invaluable tips for making financial presentations with real impact
- How to avoid the most common presentation mistakes and pitfalls

## OBJECTIVES

- The Effective Presentation Skills for Finance Professionals training course explains and practically demonstrates how to prepare for, plan, and deliver financial presentations with real impact to internal and external audiences.

By the end of this training course, the participants will learn to:

- Exploit the potential of Business Intelligence (BI) and Analytics (BA)
- Harness Excel's powerful analysis functions to develop dashboards
- Produce clear reports and business insights using Excel and Powerpoint
- Successfully integrate financial and non-financial performance measures
- Identify the needs of the audience when making financial presentations
- Use the proven rules of effective communication to get the message across
- Make presentations with real impact to internal and external audiences
- Handle difficult questions and challenging people in your presentations

## TRAINING METHODOLOGY

- This Effective Presentation Skills for Finance Professionals training course is presented in a highly participative workshop format using case studies and practical examples. The participants will have the opportunity to develop practical skills for preparing financial presentations and practice making financial presentations in a safe environment. It also includes practical hands-on sessions to demonstrate the use of Excel and Powerpoint for presentations.

## ORGANISATIONAL IMPACT

The organisation will gain through the development and application of Finance capabilities and skills in key areas of exploiting the potential of BI and BA systems, producing business insights and communicating and supporting key organisational decision-makers; specifically, benefits will include:

- Improved exploitation of BI systems and BA techniques
- Enhanced use of key business performance measures
- More significant business insights from better interpretation and presentation of financial data
- Better integration of financial and non-financial performance measures
- Raised levels of professionalism and communication skills in the Finance team
- The improved human talent pool for internal succession planning
- More effective communication with internal and external stakeholders

## PERSONAL IMPACT

The participants will learn the principles and practical skills to improve communication with non-financial managers and make effective financial presentations to them; specific capabilities and skills include:

- Ability to exploit developments in BI and BA
- Skills in the rapid development of dashboards in Excel
- How to link financial measures to strategic organisational goals
- Using Excel and Powerpoint to produce professional standard presentations
- How to communicate effectively with non-financial managers
- Designing and writing business reports with impact
- Planning and making confident presentations
- Understanding audiences and dealing with difficult questions

## WHO SHOULD ATTEND?

- Effective communication of key financial insights is at the heart of effective performance management; those employed in any aspect of business finance and accounting across the organisation should attend.

This training course is a suitably wide range of professionals but will significantly benefit:

- Tax Auditors
- Tax Managers
- Investment Analysts
- Senior Finance Managers
- Management Accountants
- Strategic Planning Managers
- Planning and Budgeting Managers
- Mergers and Acquisitions Managers
- Capital Investment and Project Team Members
- Finance Directors and Chief Financial Officers

## Course Outline

### Principles of 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

## Integrating Key Performance 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

## Preparing for a Financial Presentation

- 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

## Planning a Financial Presentation

- 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

## Delivering a Winning 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