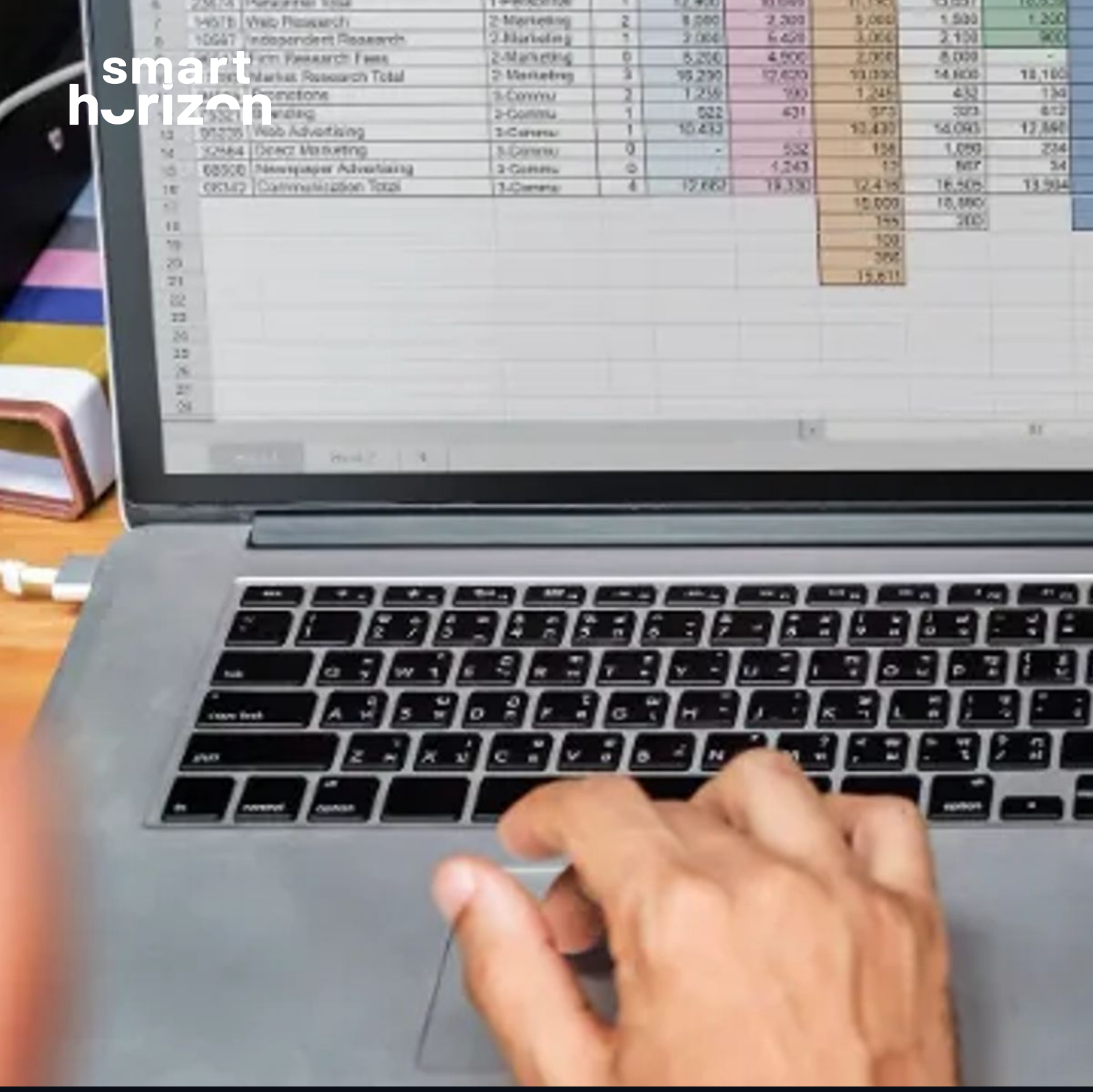


FINANCE & ACCOUNTING | COURSE BROCHURE

Advanced Business and Financial Reporting Using Excel

5 days | Classroom training | English

SMART HORIZON

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London W2 6BD, United Kingdom

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Course content

Why attend

This course equips professionals with advanced techniques in business and financial reporting using Excel. Participants will learn to create complex financial models, automate reporting processes, and analyse data effectively, enhancing their decision-making capabilities in financial environments.

Financial professionals frequently encounter challenges in generating accurate, timely reports that inform strategic decisions. Mastering advanced Excel techniques is crucial for improving efficiency and accuracy in financial reporting. This directly impacts business performance, compliance, and the ability to respond to market changes swiftly. Participants will learn to streamline their reporting processes, ensuring that they can provide stakeholders with reliable insights that drive informed decision-making. The course addresses common pitfalls in financial reporting, such as data inaccuracies, time-consuming manual processes, and the need for real-time analysis, equipping professionals with the skills to mitigate these issues effectively and enhance their reporting capabilities.
Engaging in practical exercises that simulate real-world financial reporting scenarios, participants will develop capabilities in constructing dynamic financial models and automating data analysis. They will practice tasks such as creating comprehensive financial statements, designing dashboards, and conducting scenario analyses. Additionally, participants will learn to evaluate the impact of financial decisions based on data-driven insights. By the end of the course, attendees will be proficient in using Excel to extract actionable insights from complex datasets, enhancing their ability to support strategic business decisions. This hands-on approach ensures that participants leave with applicable skills and the confidence to implement advanced reporting techniques in their organisations.

Professional Problems This Course Is Designed to Solve

- Difficulty translating subject knowledge into practical workplace decisions.
- Inconsistent approaches to the activities covered in the course outline.
- Lack of a structured plan for applying and reviewing new skills.

Course methodology

The course employs a hands-on approach, integrating case studies and practical exercises that reflect real-world financial reporting challenges. Participants will work on Excel-based simulations, developing financial models and automated reports tailored to specific business scenarios. They will engage in collaborative workshops to solve complex problems, fostering peer learning and discussion. Outputs will include comprehensive financial statements, dashboards, and automated reporting tools, demonstrating their ability to apply advanced Excel functions and tools effectively. This methodology ensures that participants not only learn theoretical concepts but also gain practical experience that they can apply immediately in their professional roles, reinforcing their learning through real-world applications.



Course content

Course objectives

By the end of this course, participants will be able to:
• Construct advanced financial models using Excel functions and tools to support decision-making.
• Automate financial reporting processes to enhance efficiency and accuracy in reporting.
• Analyse complex datasets to extract meaningful business insights for stakeholders.
• Design dynamic dashboards that present financial data effectively for strategic review.
• Evaluate financial performance using key metrics and visualisations to inform management decisions.
• Justify financial decisions based on data-driven analysis and reporting to enhance accountability.

Target audience

This course is suitable for:
• Financial Analysts: Enhance reporting skills and model construction for better analysis.
• Accountants: Improve efficiency in financial statement preparation and compliance reporting.
• Business Managers: Gain insights from financial data for informed strategic decisions.
• Data Analysts: Learn to automate and visualise financial data effectively for reporting.

Target competencies

Participants will develop competencies in:
• Advanced Excel modelling techniques for financial analysis and reporting.
• Automation of reporting processes to save time and reduce errors in data handling.
• Data visualisation skills for effective communication of financial insights to stakeholders.
• Critical thinking in evaluating financial data and performance metrics for decision-making.
• Proficiency in using Excel for complex calculations and data analysis tasks.
• Ability to design user-friendly financial dashboards that convey key information clearly.

Course outline

Day 1: Excel Foundations for Financial Reporting

Applied activity: Participants will create a basic financial report using advanced formulas and pivot tables based on provided datasets, ensuring accuracy and clarity in their reporting processes. They will validate data to prevent errors and ensure integrity in their reports, simulating a real-world reporting scenario.
Output: A structured financial report with summarised data and key insights presented clearly.

09:00–09:54	Review of Excel functionalities relevant to financial reporting, including data management.
09:54–10:48	Introduction to advanced formulas and functions (e.g., VLOOKUP, INDEX-MATCH) for data retrieval.



Course content

10:48–11:00	Data validation techniques to ensure accuracy in financial data entry and reporting.
11:00–11:30	**Coffee break**
11:30–12:12	Data validation techniques to ensure accuracy in financial data entry and reporting. (continued)
12:12–13:06	Creating and managing named ranges for better formula management and clarity.
13:06–14:00	Introduction to pivot tables for summarising and analysing financial data efficiently.

Day 2: Building Advanced Financial Models

Applied activity: Participants will build a comprehensive financial model for a fictional company, incorporating various scenarios and sensitivity analyses to project future performance. They will document their assumptions clearly and present their findings to peers for feedback, enhancing collaborative learning.
Output: A detailed financial model with multiple scenarios, assumptions, and clear documentation for review.

09:00–09:54	Understanding the components of a financial model and its importance in decision-making.
09:54–10:48	Best practices for structuring financial models in Excel for clarity and usability.
10:48–11:00	Using scenario analysis to forecast financial outcomes under different conditions.
11:00–11:30	**Coffee break**
11:30–12:12	Using scenario analysis to forecast financial outcomes under different conditions. (continued)
12:12–13:06	Incorporating sensitivity analysis into financial models to assess risk and uncertainty.
13:06–14:00	Documenting assumptions and methodologies for transparency and future reference.

Day 3: Automating Financial Reporting Processes

Applied activity: Participants will create a macro-enabled report that automatically updates financial data from a specified source, demonstrating the automation of the reporting process. They will test and troubleshoot their macros for effectiveness, simulating a real-world reporting environment.
Output: An automated financial report that updates seamlessly with new data inputs.

09:00–09:54	Introduction to Excel macros and VBA for automating repetitive reporting tasks.
09:54–10:48	Recording and editing macros to streamline financial reporting processes.
10:48–11:00	Creating automated reports with dynamic data sources to enhance efficiency.
11:00–11:30	**Coffee break**
11:30–12:12	Creating automated reports with dynamic data sources to enhance efficiency. (continued)



Course content

12:12–13:06	Utilising Excel add-ins for enhanced functionality in financial reporting.
13:06–14:00	Best practices for maintaining and troubleshooting automated reports to ensure reliability.

Day 4: Data Analysis and Visualisation Techniques

Applied activity: Participants will analyse a complex dataset and create a visual dashboard that highlights key financial metrics and trends, using advanced Excel features and visualisation techniques to support their findings. They will present their dashboards to peers for critique and improvement.
Output: A comprehensive financial dashboard with visual representations of data and key insights for presentation.

09:00–09:54	Exploring advanced data analysis tools in Excel (e.g., Power Query) for data manipulation.
09:54–10:48	Creating effective charts and graphs for financial data visualisation to support analysis.
10:48–11:00	Utilising conditional formatting for highlighting key metrics and trends in reports.
11:00–11:30	**Coffee break**
11:30–12:12	Utilising conditional formatting for highlighting key metrics and trends in reports. (continued)
12:12–13:06	Integrating Excel with Power BI for enhanced reporting capabilities and insights.
13:06–14:00	Best practices for presenting financial data to stakeholders in a clear and impactful manner.

Day 5: Integrated Financial Reporting Project

Applied activity: Participants will integrate all learned skills to produce a final financial report and presentation for a fictional company, incorporating models, automated processes, and visualisations. They will present their findings to the group, simulating a stakeholder meeting to discuss the report's implications.
Output: A complete financial report and presentation ready for stakeholder review, demonstrating comprehensive reporting skills.

09:00–09:54	Combining financial modelling, automation, and visualisation techniques into a cohesive report.
09:54–10:48	Developing a complete financial report for a fictional company based on learned skills.
10:48–11:00	Presenting financial insights to stakeholders effectively, focusing on clarity and impact.
11:00–11:30	**Coffee break**
11:30–12:12	Presenting financial insights to stakeholders effectively, focusing on clarity and impact. (continued)
12:12–13:06	Evaluating the impact of financial decisions based on the report and presenting findings.
13:06–14:00	Feedback and peer review of financial reporting projects to enhance learning.



Course content

The timings provided are estimates and may vary depending on the number of participants and the discussions taking place during the sessions. They are indicative only and do not constitute a binding commitment.

Dates, venues and fees

Current published course plans. Fees are per participant in GBP, excluding unconfirmed taxes.

Venue	Start date	End date	Fee (GBP)
Singapore Confirmed dates	9 Nov 2026	13 Nov 2026	**£2,820.–**
Online Confirmed dates	9 Nov 2026	13 Nov 2026	**£1,250.–**
London Confirmed dates	23 Nov 2026	27 Nov 2026	**£2,450.–**
Online Confirmed dates	23 Nov 2026	27 Nov 2026	**£1,250.–**
Dubai Confirmed dates	7 Dec 2026	11 Dec 2026	**£3,150.–**
Online Confirmed dates	7 Dec 2026	11 Dec 2026	**£1,250.–**
Frankfurt Confirmed dates	14 Dec 2026	18 Dec 2026	**£2,650.–**
Online Confirmed dates	14 Dec 2026	18 Dec 2026	**£1,250.–**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Kuala Lumpur Confirmed dates	11 Jan 2027	15 Jan 2027	**£1,450.-**
Online Confirmed dates	11 Jan 2027	15 Jan 2027	**£1,250.-**
Rome Confirmed dates	18 Jan 2027	22 Jan 2027	**£2,450.-**
Online Confirmed dates	18 Jan 2027	22 Jan 2027	**£1,250.-**
Paris Confirmed dates	25 Jan 2027	29 Jan 2027	**£2,860.-**
Online Confirmed dates	25 Jan 2027	29 Jan 2027	**£1,250.-**
Istanbul Confirmed dates	8 Feb 2027	12 Feb 2027	**£2,650.-**
Online Confirmed dates	8 Feb 2027	12 Feb 2027	**£1,250.-**
Amsterdam Confirmed dates	22 Feb 2027	26 Feb 2027	**£2,540.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	22 Feb 2027	26 Feb 2027	**£1,250.-**
Singapore Confirmed dates	8 Mar 2027	12 Mar 2027	**£2,820.-**
Online Confirmed dates	8 Mar 2027	12 Mar 2027	**£1,250.-**
Cape Town Confirmed dates	15 Mar 2027	19 Mar 2027	**£1,890.-**
Online Confirmed dates	15 Mar 2027	19 Mar 2027	**£1,250.-**
London Confirmed dates	22 Mar 2027	26 Mar 2027	**£2,450.-**
Online Confirmed dates	22 Mar 2027	26 Mar 2027	**£1,250.-**
Dubai Confirmed dates	12 Apr 2027	16 Apr 2027	**£3,150.-**
Online Confirmed dates	12 Apr 2027	16 Apr 2027	**£1,250.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Frankfurt Confirmed dates	26 Apr 2027	30 Apr 2027	**£2,650.-**
Online Confirmed dates	26 Apr 2027	30 Apr 2027	**£1,250.-**
Kuala Lumpur Confirmed dates	10 May 2027	14 May 2027	**£1,450.-**
Online Confirmed dates	10 May 2027	14 May 2027	**£1,250.-**
Vienna Confirmed dates	17 May 2027	21 May 2027	**£2,940.-**
Online Confirmed dates	17 May 2027	21 May 2027	**£1,250.-**
Paris Confirmed dates	24 May 2027	28 May 2027	**£2,860.-**
Online Confirmed dates	24 May 2027	28 May 2027	**£1,250.-**
Istanbul Confirmed dates	14 Jun 2027	18 Jun 2027	**£2,650.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	14 Jun 2027	18 Jun 2027	**£1,250.-**
Amsterdam Confirmed dates	21 Jun 2027	25 Jun 2027	**£2,540.-**
Online Confirmed dates	21 Jun 2027	25 Jun 2027	**£1,250.-**
Singapore Confirmed dates	12 Jul 2027	16 Jul 2027	**£2,820.-**
Online Confirmed dates	12 Jul 2027	16 Jul 2027	**£1,250.-**
Barcelona Confirmed dates	19 Jul 2027	23 Jul 2027	**£2,840.-**
Online Confirmed dates	19 Jul 2027	23 Jul 2027	**£1,250.-**
London Confirmed dates	26 Jul 2027	30 Jul 2027	**£2,450.-**
Online Confirmed dates	26 Jul 2027	30 Jul 2027	**£1,250.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Dubai Confirmed dates	9 Aug 2027	13 Aug 2027	**£3,150.-**
Online Confirmed dates	9 Aug 2027	13 Aug 2027	**£1,250.-**
Frankfurt Confirmed dates	23 Aug 2027	27 Aug 2027	**£2,650.-**
Online Confirmed dates	23 Aug 2027	27 Aug 2027	**£1,250.-**
Cape Town Confirmed dates	6 Sept 2027	10 Sept 2027	**£1,890.-**
Online Confirmed dates	6 Sept 2027	10 Sept 2027	**£1,250.-**
Kuala Lumpur Confirmed dates	13 Sept 2027	17 Sept 2027	**£1,450.-**
Online Confirmed dates	13 Sept 2027	17 Sept 2027	**£1,250.-**
Paris Confirmed dates	20 Sept 2027	24 Sept 2027	**£2,860.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	20 Sept 2027	24 Sept 2027	**£1,250.-**
Istanbul Confirmed dates	11 Oct 2027	15 Oct 2027	**£2,650.-**
Online Confirmed dates	11 Oct 2027	15 Oct 2027	**£1,250.-**
Amsterdam Confirmed dates	25 Oct 2027	29 Oct 2027	**£2,540.-**
Online Confirmed dates	25 Oct 2027	29 Oct 2027	**£1,250.-**
Singapore Confirmed dates	8 Nov 2027	12 Nov 2027	**£2,820.-**
Online Confirmed dates	8 Nov 2027	12 Nov 2027	**£1,250.-**
Rome Confirmed dates	15 Nov 2027	19 Nov 2027	**£2,450.-**
Online Confirmed dates	15 Nov 2027	19 Nov 2027	**£1,250.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
London Confirmed dates	22 Nov 2027	26 Nov 2027	**£2,450.-**
Online Confirmed dates	22 Nov 2027	26 Nov 2027	**£1,250.-**
Dubai Confirmed dates	6 Dec 2027	10 Dec 2027	**£3,150.-**
Online Confirmed dates	6 Dec 2027	10 Dec 2027	**£1,250.-**
Frankfurt Confirmed dates	13 Dec 2027	17 Dec 2027	**£2,650.-**
Online Confirmed dates	13 Dec 2027	17 Dec 2027	**£1,250.-**



Course content

Plan your next step

Dates, availability, exact venue, taxes, inclusions and payment terms require written confirmation. This brochure is not a quotation, registration, booking confirmation or visa invitation. Participants receive a Smart Horizon UK certificate of attendance; programmes are not externally accredited and do not award a professional qualification or designation. Confirm arrangements before booking travel.

For group or in-house training, contact our learning team to discuss your objectives and delivery arrangements.

Contact Smart Horizon

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View the latest course details online