

FINANCE & ACCOUNTING | COURSE BROCHURE

Business Intelligence & Analytics for Finance Professionals

5 days | Classroom training | English

SMART HORIZON

info@smarthorizon.uk
2 Kingdom Street, Paddington
London W2 6BD, United Kingdom

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Course content

Why attend

This course equips finance professionals with essential business intelligence and analytics skills. Participants will learn to leverage data for informed decision-making, enhance financial reporting, and apply analytical techniques to drive strategic insights within their organisations.

Finance professionals often face challenges in interpreting vast amounts of data to inform strategic decisions. The ability to analyse and present data effectively is crucial for enhancing financial performance and operational efficiency. This course addresses the need for finance professionals to develop skills in business intelligence and analytics, enabling them to transform raw data into actionable insights. Participants will learn how to identify key trends, assess financial health, and make data-driven recommendations that align with organisational goals. Mastering these skills will empower finance professionals to improve their decision-making capabilities, ultimately leading to better financial outcomes and strategic alignment within their organisations.
Engaging in practical exercises, participants will simulate real-world scenarios, such as developing financial dashboards and conducting variance analysis. They will learn to apply analytical techniques to evaluate investment opportunities and assess risk management strategies. By mastering these skills, participants will improve their ability to present data-driven recommendations to stakeholders, ensuring that financial strategies are informed by accurate insights. This course empowers finance professionals to harness the power of data analytics, fostering a culture of informed decision-making that can lead to enhanced financial performance, operational efficiencies, and strategic planning.

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 blend of interactive workshops, case studies, and hands-on exercises to build practical skills in business intelligence and analytics. Participants will work with financial datasets to create dashboards, perform trend analyses, and generate reports. Specific exercises will include scenario-based learning, where participants will analyse case studies to identify best practices in financial reporting. Outputs will include visual data representations and analytical reports, demonstrating their ability to apply learned techniques to real-world financial scenarios. This approach ensures that participants not only understand theoretical concepts but also gain the practical experience necessary to implement these skills in their roles.



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Course objectives

By the end of this course, participants will be able to:
• Analyse financial data trends to support strategic decision-making in finance.
• Construct interactive dashboards using business intelligence tools for effective financial reporting.
• Evaluate the impact of various financial metrics on business performance and decision-making.
• Design predictive models to forecast financial outcomes based on historical data analysis.
• Compare different analytical techniques for financial data interpretation and reporting.
• Assess the effectiveness of data visualisation methods in communicating financial insights to stakeholders.
• Implement a business intelligence strategy tailored to financial operations and reporting needs.
• Critique the integration of BI tools with existing financial systems to enhance data-driven decisions.

Target audience

This course is suitable for:
• Financial Analysts - to enhance their data analysis capabilities and reporting accuracy.
• Accountants - to improve financial reporting efficiency and data interpretation skills.
• Finance Managers - to support strategic planning with data-driven insights and analytics.
• Investment Analysts - to evaluate investment opportunities using advanced analytical techniques.

Target competencies

Participants will develop competencies in:
• Data interpretation for financial decision-making and reporting.
• Dashboard creation using business intelligence software for visual insights.
• Predictive modelling for financial forecasting and scenario analysis.
• Effective communication of financial insights through data visualisation techniques.
• Analytical thinking for problem-solving in finance-related challenges.
• Application of statistical techniques in financial analysis and reporting.

Course outline

Day 1: Foundations of Business Intelligence

Applied activity: Participants will evaluate a provided financial dataset for quality and relevance, identifying potential issues and proposing solutions for data cleansing. They will also define KPIs for a fictional financial report, considering their impact on business performance.
Output: A report detailing data quality issues and a KPI definition document for financial metrics.



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09:00–09:54	Introduction to Business Intelligence concepts and frameworks relevant to finance.
09:54–10:48	Understanding data sources, data quality, and their implications for financial analysis.
10:48–11:00	Identifying key performance indicators (KPIs) relevant to financial reporting and decision-making.
11:00–11:30	Coffee break
11:30–12:12	Identifying key performance indicators (KPIs) relevant to financial reporting and decision-making. (continued)
12:12–13:06	Overview of business intelligence tools and technologies applicable in finance.
13:06–14:00	Data governance, compliance, and ethical considerations in financial contexts.

Day 2: Data Visualisation Techniques

Applied activity: Using a provided financial dataset, participants will create a series of visualisations that highlight key trends and insights, preparing to present their findings to a mock board. They will receive feedback on their presentation style and data interpretation.
Output: A presentation deck with visualisations and accompanying notes for stakeholder engagement.

09:00–09:54	Principles of effective data visualisation in financial contexts and reporting.
09:54–10:48	Exploring visualisation tools and software for presenting financial data.
10:48–11:00	Creating charts and graphs that convey complex financial information clearly and accurately.
11:00–11:30	Coffee break
11:30–12:12	Creating charts and graphs that convey complex financial information clearly and accurately. (continued)
12:12–13:06	Best practices for presenting financial data to stakeholders and decision-makers.
13:06–14:00	Case studies on successful financial data visualisations and their impact on business outcomes.

Day 3: Advanced Analytical Techniques

Applied activity: Participants will apply regression analysis to a financial dataset to forecast future performance, comparing their findings with historical data to validate their model. They will present their analysis to peers for critique and discussion.
Output: A comprehensive analytical report with forecasts, justifications, and peer feedback.

09:00–09:54	Introduction to statistical analysis methods applicable in finance.



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09:54–10:48	Using regression analysis for financial forecasting and performance evaluation.
10:48–11:00	Time series analysis for identifying trends and seasonality in financial data.
11:00–11:30	Coffee break
11:30–12:12	Time series analysis for identifying trends and seasonality in financial data. (continued)
12:12–13:06	Scenario analysis and sensitivity testing in financial models for risk assessment.
13:06–14:00	Integrating qualitative data into quantitative analysis for comprehensive insights.

Day 4: Implementing Business Intelligence Solutions

Applied activity: In groups, participants will develop a project plan for implementing a BI solution in a fictional finance department, addressing potential challenges, user training needs, and expected outcomes. They will present their plans to the class.
Output: A project plan document outlining steps, timelines, training strategies, and expected benefits of the BI implementation.

09:00–09:54	Steps to implement a business intelligence strategy in finance departments.
09:54–10:48	Challenges and considerations in BI project management and execution.
10:48–11:00	Integrating BI tools with existing financial systems for seamless data flow.
11:00–11:30	Coffee break
11:30–12:12	Integrating BI tools with existing financial systems for seamless data flow. (continued)
12:12–13:06	User training and adoption strategies for BI solutions in finance.
13:06–14:00	Evaluating the success of BI implementations in finance and identifying areas for improvement.

Day 5: Capstone Project: Financial Analytics Integration

Applied activity: Participants will undertake a capstone project where they analyse a fictional company's financial data, create a BI dashboard, and present their findings and recommendations to a panel of peers and instructors. This will involve integrating all skills learned throughout the course.
Output: A final project presentation and a BI dashboard demonstrating analytical insights and recommendations.

09:00–09:54	Bringing together BI and analytics skills in finance for comprehensive analysis.
09:54–10:48	Developing a comprehensive financial analysis project using learned techniques.
10:48–11:00	Presenting analytical findings to stakeholders in a professional format.



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11:00–11:30	**Coffee break**
11:30–12:12	Presenting analytical findings to stakeholders in a professional format. (continued)
12:12–13:06	Feedback and iterative improvement in financial reporting and decision-making.
13:06–14:00	Future trends in business intelligence and finance analytics.

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)
Istanbul Confirmed dates	9 Nov 2026	13 Nov 2026	**£2,650.-**
Online Confirmed dates	9 Nov 2026	13 Nov 2026	**£1,250.-**
Amsterdam Confirmed dates	23 Nov 2026	27 Nov 2026	**£2,540.-**
Online Confirmed dates	23 Nov 2026	27 Nov 2026	**£1,250.-**
Singapore Confirmed dates	7 Dec 2026	11 Dec 2026	**£2,820.-**
Online Confirmed dates	7 Dec 2026	11 Dec 2026	**£1,250.-**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
London Confirmed dates	14 Dec 2026	18 Dec 2026	**£2,450.-**
Online Confirmed dates	14 Dec 2026	18 Dec 2026	**£1,250.-**
Vienna Confirmed dates	4 Jan 2027	8 Jan 2027	**£2,940.-**
Online Confirmed dates	4 Jan 2027	8 Jan 2027	**£1,250.-**
Dubai Confirmed dates	11 Jan 2027	15 Jan 2027	**£3,150.-**
Online Confirmed dates	11 Jan 2027	15 Jan 2027	**£1,250.-**
Frankfurt Confirmed dates	25 Jan 2027	29 Jan 2027	**£2,650.-**
Online Confirmed dates	25 Jan 2027	29 Jan 2027	**£1,250.-**
Kuala Lumpur Confirmed dates	8 Feb 2027	12 Feb 2027	**£1,450.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	8 Feb 2027	12 Feb 2027	**£1,250.–**
Paris Confirmed dates	22 Feb 2027	26 Feb 2027	**£2,860.–**
Online Confirmed dates	22 Feb 2027	26 Feb 2027	**£1,250.–**
Istanbul Confirmed dates	8 Mar 2027	12 Mar 2027	**£2,650.–**
Online Confirmed dates	8 Mar 2027	12 Mar 2027	**£1,250.–**
Rome Confirmed dates	15 Mar 2027	19 Mar 2027	**£2,450.–**
Online Confirmed dates	15 Mar 2027	19 Mar 2027	**£1,250.–**
Amsterdam Confirmed dates	22 Mar 2027	26 Mar 2027	**£2,540.–**
Online Confirmed dates	22 Mar 2027	26 Mar 2027	**£1,250.–**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Singapore Confirmed dates	12 Apr 2027	16 Apr 2027	**£2,820.-**
Online Confirmed dates	12 Apr 2027	16 Apr 2027	**£1,250.-**
London Confirmed dates	26 Apr 2027	30 Apr 2027	**£2,450.-**
Online Confirmed dates	26 Apr 2027	30 Apr 2027	**£1,250.-**
Dubai Confirmed dates	10 May 2027	14 May 2027	**£3,150.-**
Online Confirmed dates	10 May 2027	14 May 2027	**£1,250.-**
Rome Confirmed dates	17 May 2027	21 May 2027	**£2,450.-**
Online Confirmed dates	17 May 2027	21 May 2027	**£1,250.-**
Frankfurt Confirmed dates	24 May 2027	28 May 2027	**£2,650.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	24 May 2027	28 May 2027	**£1,250.-**
Kuala Lumpur Confirmed dates	14 Jun 2027	18 Jun 2027	**£1,450.-**
Online Confirmed dates	14 Jun 2027	18 Jun 2027	**£1,250.-**
Paris Confirmed dates	21 Jun 2027	25 Jun 2027	**£2,860.-**
Online Confirmed dates	21 Jun 2027	25 Jun 2027	**£1,250.-**
Barcelona Confirmed dates	5 Jul 2027	9 Jul 2027	**£2,840.-**
Online Confirmed dates	5 Jul 2027	9 Jul 2027	**£1,250.-**
Istanbul Confirmed dates	12 Jul 2027	16 Jul 2027	**£2,650.-**
Online Confirmed dates	12 Jul 2027	16 Jul 2027	**£1,250.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Amsterdam Confirmed dates	26 Jul 2027	30 Jul 2027	**£2,540.-**
Online Confirmed dates	26 Jul 2027	30 Jul 2027	**£1,250.-**
Singapore Confirmed dates	9 Aug 2027	13 Aug 2027	**£2,820.-**
Online Confirmed dates	9 Aug 2027	13 Aug 2027	**£1,250.-**
London Confirmed dates	23 Aug 2027	27 Aug 2027	**£2,450.-**
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.-**
Dubai Confirmed dates	13 Sept 2027	17 Sept 2027	**£3,150.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	13 Sept 2027	17 Sept 2027	**£1,250.–**
Frankfurt Confirmed dates	20 Sept 2027	24 Sept 2027	**£2,650.–**
Online Confirmed dates	20 Sept 2027	24 Sept 2027	**£1,250.–**
Kuala Lumpur Confirmed dates	11 Oct 2027	15 Oct 2027	**£1,450.–**
Online Confirmed dates	11 Oct 2027	15 Oct 2027	**£1,250.–**
Paris Confirmed dates	25 Oct 2027	29 Oct 2027	**£2,860.–**
Online Confirmed dates	25 Oct 2027	29 Oct 2027	**£1,250.–**
Istanbul Confirmed dates	8 Nov 2027	12 Nov 2027	**£2,650.–**
Online Confirmed dates	8 Nov 2027	12 Nov 2027	**£1,250.–**



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Dates, venues and fees (continued)

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Cape Town Confirmed dates	15 Nov 2027	19 Nov 2027	**£1,890.-**
Online Confirmed dates	15 Nov 2027	19 Nov 2027	**£1,250.-**
Amsterdam Confirmed dates	22 Nov 2027	26 Nov 2027	**£2,540.-**
Online Confirmed dates	22 Nov 2027	26 Nov 2027	**£1,250.-**
Singapore Confirmed dates	6 Dec 2027	10 Dec 2027	**£2,820.-**
Online Confirmed dates	6 Dec 2027	10 Dec 2027	**£1,250.-**
London Confirmed dates	13 Dec 2027	17 Dec 2027	**£2,450.-**
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