

FINANCE & ACCOUNTING | COURSE BROCHURE

Financial Close Acceleration and Reporting Automation

5 days | Classroom training | English

SMART HORIZON

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Course content

Why attend

Many finance teams still need two or three weeks to close the books, leaving little time for analysis. This course shows how leading organisations close in days by redesigning the close calendar, standardising reconciliations, reducing manual journals and using automation and reporting tools. Participants map their own close process and leave with a practical acceleration plan.

A faster, cleaner close frees finance to support decisions instead of chasing numbers. You will learn proven techniques to remove bottlenecks, improve accuracy and introduce automation without losing control.

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

Participants map their current close, analyse bottlenecks in groups, review automation demonstrations, benchmark against good practice and build a close improvement roadmap.

Course objectives

By the end of this course, participants will be able to:
• Map the end-to-end financial close and identify bottlenecks
• Design a close calendar with clear ownership and deadlines
• Standardise reconciliations and journal processes
• Apply automation and robotic tools to repetitive close tasks
• Strengthen controls while reducing cycle time
• Build a roadmap for continuous close improvement

Target audience

This course is suitable for:
• Financial controllers and finance managers
• Group reporting and consolidation teams
• Accounting team leaders
• Finance transformation professionals
• Internal auditors reviewing the close
• Shared service centre managers



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Target competencies

Participants will develop competencies in:

- Process mapping
- Close management
- Finance automation
- Control design
- Continuous improvement

Course outline

Day 1: Understanding the Close

09:00–09:54	Components of the month-end and year-end close
09:54–10:48	Common causes of delay and error
10:48–11:00	Measuring close performance
11:00–11:30	**Coffee break**
11:30–12:12	Measuring close performance (continued)
12:12–13:06	Benchmarking against leading practice
13:06–14:00	Exercise: mapping your close

Day 2: Redesigning the Close Calendar

09:00–09:54	Day-by-day close planning
09:54–10:48	Pre-close and soft-close techniques
10:48–11:00	Ownership, hand-offs and dependencies
11:00–11:30	**Coffee break**
11:30–12:12	Ownership, hand-offs and dependencies (continued)
12:12–13:06	Materiality and estimation policies
13:06–14:00	Workshop: building a close calendar

Day 3: Reconciliations and Journals

09:00–09:54	Account reconciliation standards



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09:54–10:48	Risk-based reconciliation frequency
10:48–11:00	Reducing manual and recurring journals
11:00–11:30	**Coffee break**
11:30–12:12	Reducing manual and recurring journals (continued)
12:12–13:06	Intercompany matching and settlement
13:06–14:00	Exercise: reconciliation policy design

Day 4: Automation and Tools

09:00–09:54	Close management software
09:54–10:48	Robotic process automation in finance
10:48–11:00	Automated consolidation and reporting
11:00–11:30	**Coffee break**
11:30–12:12	Automated consolidation and reporting (continued)
12:12–13:06	Data quality and system integration
13:06–14:00	Demonstration: automated reporting pack

Day 5: Control and Sustainability

09:00–09:54	Keeping controls strong at speed
09:54–10:48	Close dashboards and KPIs
10:48–11:00	Change management for finance teams
11:00–11:30	**Coffee break**
11:30–12:12	Change management for finance teams (continued)
12:12–13:06	Continuous improvement routines
13:06–14:00	Personal close acceleration roadmap

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.



Course content

Dates, venues and fees

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

Venue	Start date	End date	Fee (GBP)
London Confirmed dates	9 Nov 2026	13 Nov 2026	**£2,450.–**
Online Confirmed dates	9 Nov 2026	13 Nov 2026	**£1,250.–**
Kuala Lumpur Confirmed dates	23 Nov 2026	27 Nov 2026	**£1,450.–**
Online Confirmed dates	23 Nov 2026	27 Nov 2026	**£1,250.–**
Istanbul Confirmed dates	14 Dec 2026	18 Dec 2026	**£2,650.–**
Online Confirmed dates	14 Dec 2026	18 Dec 2026	**£1,250.–**
Barcelona Confirmed dates	18 Jan 2027	22 Jan 2027	**£2,840.–**
Online Confirmed dates	18 Jan 2027	22 Jan 2027	**£1,250.–**
Paris Confirmed dates	8 Feb 2027	12 Feb 2027	**£2,860.–**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	8 Feb 2027	12 Feb 2027	**£1,250.–**
Frankfurt Confirmed dates	1 Mar 2027	5 Mar 2027	**£2,650.–**
Online Confirmed dates	1 Mar 2027	5 Mar 2027	**£1,250.–**
Vienna Confirmed dates	15 Mar 2027	19 Mar 2027	**£2,940.–**
Online Confirmed dates	15 Mar 2027	19 Mar 2027	**£1,250.–**
Cape Town Confirmed dates	5 Apr 2027	9 Apr 2027	**£1,890.–**
Online Confirmed dates	5 Apr 2027	9 Apr 2027	**£1,250.–**
Dubai Confirmed dates	26 Apr 2027	30 Apr 2027	**£3,150.–**
Online Confirmed dates	26 Apr 2027	30 Apr 2027	**£1,250.–**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Cape Town Confirmed dates	17 May 2027	21 May 2027	**£1,890.–**
Online Confirmed dates	17 May 2027	21 May 2027	**£1,250.–**
Rome Confirmed dates	7 Jun 2027	11 Jun 2027	**£2,450.–**
Online Confirmed dates	7 Jun 2027	11 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.–**
Rome Confirmed dates	12 Jul 2027	16 Jul 2027	**£2,450.–**
Online Confirmed dates	12 Jul 2027	16 Jul 2027	**£1,250.–**
Dubai Confirmed dates	2 Aug 2027	6 Aug 2027	**£3,150.–**



Course content

Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	2 Aug 2027	6 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	13 Sept 2027	17 Sept 2027	**£1,890.-**
Online Confirmed dates	13 Sept 2027	17 Sept 2027	**£1,250.-**
Dubai Confirmed dates	27 Sept 2027	1 Oct 2027	**£3,150.-**
Online Confirmed dates	27 Sept 2027	1 Oct 2027	**£1,250.-**
Barcelona Confirmed dates	18 Oct 2027	22 Oct 2027	**£2,840.-**
Online Confirmed dates	18 Oct 2027	22 Oct 2027	**£1,250.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Rome Confirmed dates	8 Nov 2027	12 Nov 2027	**£2,450.-**
Online Confirmed dates	8 Nov 2027	12 Nov 2027	**£1,250.-**
Vienna Confirmed dates	29 Nov 2027	3 Dec 2027	**£2,940.-**
Online Confirmed dates	29 Nov 2027	3 Dec 2027	**£1,250.-**

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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