

FINANCE & ACCOUNTING | COURSE BROCHURE

Financial Data Visualisation and Board Reporting

5 days | Classroom training | English

SMART HORIZON

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Course content

Why attend

Boards and executives need clear, concise financial information to make decisions. This course teaches finance professionals how to design effective management and board reports, select the right charts, build dashboards, write insightful commentary and present financial information persuasively. Participants redesign real reports and build a dashboard using common business tools.

Dense tables and long reports hide important messages. This course helps you turn financial data into clear visual stories that support better decisions and raise the profile of the finance function.

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 is practical, with report redesign exercises, chart selection workshops, dashboard building labs and presentation practice.

Course objectives

By the end of this course, participants will be able to:
• Apply principles of effective data visualisation
• Select appropriate charts for financial information
• Design concise management and board reports
• Build interactive financial dashboards
• Write clear commentary and insights
• Present financial results with impact

Target audience

This course is suitable for:
• Finance managers and controllers
• FP&A and reporting analysts
• Management accountants
• Company secretaries supporting boards
• CFOs



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Target competencies

Participants will develop competencies in:

- Data visualisation
- Dashboard design
- Report design
- Financial commentary
- Executive presentation
- Information prioritisation

Course outline

Day 1: Principles of Visualisation

09:00–09:54	How people process visual information
09:54–10:48	Clutter and focus
10:48–11:00	Colour and layout
11:00–11:30	**Coffee break**
11:30–12:12	Colour and layout (continued)
12:12–13:06	Common visualisation mistakes
13:06–14:00	Exercise: Critiquing reports

Day 2: Charts for Finance

09:00–09:54	Choosing chart types
09:54–10:48	Variance and bridge charts
10:48–11:00	Trends and comparisons
11:00–11:30	**Coffee break**
11:30–12:12	Trends and comparisons (continued)
12:12–13:06	Tables that work
13:06–14:00	Lab: Rebuilding financial charts



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Day 3: Board and Management Reports

09:00–09:54	What boards need
09:54–10:48	Report structure
10:48–11:00	KPIs and exception reporting
11:00–11:30	**Coffee break**
11:30–12:12	KPIs and exception reporting (continued)
12:12–13:06	One-page summaries
13:06–14:00	Workshop: Redesigning a board pack

Day 4: Dashboards

09:00–09:54	Dashboard design principles
09:54–10:48	Interactive filters and drill-downs
10:48–11:00	Data preparation
11:00–11:30	**Coffee break**
11:30–12:12	Data preparation (continued)
12:12–13:06	Automation
13:06–14:00	Lab: Building a finance dashboard

Day 5: Commentary and Presentation

09:00–09:54	Writing insight-led commentary
09:54–10:48	Storytelling with numbers
10:48–11:00	Presenting to executives
11:00–11:30	**Coffee break**
11:30–12:12	Presenting to executives (continued)
12:12–13:06	Handling questions
13:06–14:00	Capstone: Board report presentation

The timings provided are estimates and may vary depending on the number of participants and the discussions taking place during the



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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)
Kuala Lumpur Confirmed dates	9 Nov 2026	13 Nov 2026	**£1,450.–**
Online Confirmed dates	9 Nov 2026	13 Nov 2026	**£1,250.–**
Paris Confirmed dates	23 Nov 2026	27 Nov 2026	**£2,860.–**
Online Confirmed dates	23 Nov 2026	27 Nov 2026	**£1,250.–**
Istanbul Confirmed dates	7 Dec 2026	11 Dec 2026	**£2,650.–**
Online Confirmed dates	7 Dec 2026	11 Dec 2026	**£1,250.–**
Amsterdam Confirmed dates	14 Dec 2026	18 Dec 2026	**£2,540.–**
Online Confirmed dates	14 Dec 2026	18 Dec 2026	**£1,250.–**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Singapore Confirmed dates	11 Jan 2027	15 Jan 2027	**£2,820.-**
Online Confirmed dates	11 Jan 2027	15 Jan 2027	**£1,250.-**
London Confirmed dates	25 Jan 2027	29 Jan 2027	**£2,450.-**
Online Confirmed dates	25 Jan 2027	29 Jan 2027	**£1,250.-**
Cape Town Confirmed dates	1 Feb 2027	5 Feb 2027	**£1,890.-**
Online Confirmed dates	1 Feb 2027	5 Feb 2027	**£1,250.-**
Dubai Confirmed dates	8 Feb 2027	12 Feb 2027	**£3,150.-**
Online Confirmed dates	8 Feb 2027	12 Feb 2027	**£1,250.-**
Frankfurt Confirmed dates	22 Feb 2027	26 Feb 2027	**£2,650.-**



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.–**
Kuala Lumpur Confirmed dates	8 Mar 2027	12 Mar 2027	**£1,450.–**
Online Confirmed dates	8 Mar 2027	12 Mar 2027	**£1,250.–**
Paris Confirmed dates	22 Mar 2027	26 Mar 2027	**£2,860.–**
Online Confirmed dates	22 Mar 2027	26 Mar 2027	**£1,250.–**
Rome Confirmed dates	5 Apr 2027	9 Apr 2027	**£2,450.–**
Online Confirmed dates	5 Apr 2027	9 Apr 2027	**£1,250.–**
Istanbul Confirmed dates	12 Apr 2027	16 Apr 2027	**£2,650.–**
Online Confirmed dates	12 Apr 2027	16 Apr 2027	**£1,250.–**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Amsterdam Confirmed dates	26 Apr 2027	30 Apr 2027	**£2,540.-**
Online Confirmed dates	26 Apr 2027	30 Apr 2027	**£1,250.-**
Singapore Confirmed dates	10 May 2027	14 May 2027	**£2,820.-**
Online Confirmed dates	10 May 2027	14 May 2027	**£1,250.-**
London Confirmed dates	24 May 2027	28 May 2027	**£2,450.-**
Online Confirmed dates	24 May 2027	28 May 2027	**£1,250.-**
Vienna Confirmed dates	31 May 2027	4 Jun 2027	**£2,940.-**
Online Confirmed dates	31 May 2027	4 Jun 2027	**£1,250.-**
Dubai Confirmed dates	14 Jun 2027	18 Jun 2027	**£3,150.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	14 Jun 2027	18 Jun 2027	**£1,250.–**
Frankfurt Confirmed dates	21 Jun 2027	25 Jun 2027	**£2,650.–**
Online Confirmed dates	21 Jun 2027	25 Jun 2027	**£1,250.–**
Kuala Lumpur Confirmed dates	12 Jul 2027	16 Jul 2027	**£1,450.–**
Online Confirmed dates	12 Jul 2027	16 Jul 2027	**£1,250.–**
Paris Confirmed dates	26 Jul 2027	30 Jul 2027	**£2,860.–**
Online Confirmed dates	26 Jul 2027	30 Jul 2027	**£1,250.–**
Cape Town Confirmed dates	2 Aug 2027	6 Aug 2027	**£1,890.–**
Online Confirmed dates	2 Aug 2027	6 Aug 2027	**£1,250.–**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Istanbul Confirmed dates	9 Aug 2027	13 Aug 2027	**£2,650.-**
Online Confirmed dates	9 Aug 2027	13 Aug 2027	**£1,250.-**
Amsterdam Confirmed dates	23 Aug 2027	27 Aug 2027	**£2,540.-**
Online Confirmed dates	23 Aug 2027	27 Aug 2027	**£1,250.-**
Singapore Confirmed dates	13 Sept 2027	17 Sept 2027	**£2,820.-**
Online Confirmed dates	13 Sept 2027	17 Sept 2027	**£1,250.-**
London Confirmed dates	20 Sept 2027	24 Sept 2027	**£2,450.-**
Online Confirmed dates	20 Sept 2027	24 Sept 2027	**£1,250.-**
Barcelona Confirmed dates	4 Oct 2027	8 Oct 2027	**£2,840.-**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Online Confirmed dates	4 Oct 2027	8 Oct 2027	**£1,250.–**
Dubai Confirmed dates	11 Oct 2027	15 Oct 2027	**£3,150.–**
Online Confirmed dates	11 Oct 2027	15 Oct 2027	**£1,250.–**
Frankfurt Confirmed dates	25 Oct 2027	29 Oct 2027	**£2,650.–**
Online Confirmed dates	25 Oct 2027	29 Oct 2027	**£1,250.–**
Kuala Lumpur Confirmed dates	8 Nov 2027	12 Nov 2027	**£1,450.–**
Online Confirmed dates	8 Nov 2027	12 Nov 2027	**£1,250.–**
Paris Confirmed dates	22 Nov 2027	26 Nov 2027	**£2,860.–**
Online Confirmed dates	22 Nov 2027	26 Nov 2027	**£1,250.–**



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Dates, venues and fees (continued)

Venue	Start date	End date	Fee (GBP)
Rome Confirmed dates	29 Nov 2027	3 Dec 2027	**£2,450.–**
Online Confirmed dates	29 Nov 2027	3 Dec 2027	**£1,250.–**
Istanbul Confirmed dates	6 Dec 2027	10 Dec 2027	**£2,650.–**
Online Confirmed dates	6 Dec 2027	10 Dec 2027	**£1,250.–**
Amsterdam Confirmed dates	13 Dec 2027	17 Dec 2027	**£2,540.–**
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