Finance & Business Acumen · FB294

Fundamentals of Finance Reporting Using Excel

Online · 20 - 24 Dec 2026

Date	Venue	Duration
20 - 24 Dec 2026	**Online**	**1 Week**
Fee	Ref	Language
£1,400 GBP	**FB294**	**English**

Introduction

Financial reporting is an essential function for organisations of all sizes, enabling decision-makers to evaluate performance, track financial health, and ensure compliance with regulatory requirements. Microsoft Excel is a powerful tool that simplifies financial data management, enhances accuracy, and improves efficiency in reporting.

This training programme is designed for professionals who are new to financial reporting and Excel, providing them with the fundamental skills needed to create, analyse, and present financial data effectively. Through hands-on exercises and practical applications, participants will gain confidence in using Excel for financial reporting, from data entry and formatting to structuring financial statements and analysing key metrics.

By the end of this course, attendees will have a solid understanding of financial reporting principles, practical Excel skills, and the ability to generate insightful reports that support data-driven decision-making.

Course Objectives of Fundamentals of Finance Reporting Using Excel

Upon completing this programme, participants will be able to:

- Understand the fundamental principles of financial reporting and its role in business decision-making.
- Learn key financial reporting structures and terminology.
- Develop essential Excel skills for financial data management, including formatting, formulas, and functions.
- Gain hands-on experience in creating financial statements such as income statements, balance sheets, and cash flow reports.
- Learn data visualisation techniques to present financial data clearly and effectively.
- Understand best practices for financial accuracy and report integrity.

Course Methodology of Fundamentals of Finance Reporting Using Excel

- Lectures and Expert Insights: Leading industry experts will share their insights and best practices.
- Case Studies: Analyse real-world talent acquisition challenges and solutions.
- Group Discussions: Engage in meaningful discussions and share experiences with peers.
- Role-Playing and Simulations: Practice recruitment scenarios to enhance skills.
- Hands-on Workshops: Gain practical experience in using recruitment tools and techniques.

Organisational Impact of Fundamentals of Finance Reporting Using Excel

This training programme will have a positive impact on organisations by:

- Improved accuracy and consistency in financial data management.
- Enhanced decision-making through well-structured financial reports.
- Increased efficiency in financial analysis and reporting processes.
- Reduced errors and compliance risks in financial statements.
- Empowered employees with fundamental Excel skills to enhance productivity.

Personal Impact of Fundamentals of Finance Reporting Using Excel

Participants will experience personal growth and development, including:

- Increased confidence in handling financial data and creating reports.
- Strong foundational skills in Excel for financial applications.
- Enhanced ability to analyse and present financial information effectively.
- Practical knowledge applicable to various roles in finance, accounting, and administration.
- Improved job performance and career growth opportunities in financial reporting roles.

Who Should Attend

This training programme is ideal for:

- Finance and accounting professionals new to financial reporting.
- Business professionals responsible for financial data management.
- Administrative staff who manage financial information in Excel.
- Entrepreneurs and small business owners seeking to understand financial reporting fundamentals.
- Anyone looking to build a solid foundation in financial reporting using Excel.

Course Outlines

Day 1

Introduction to Financial Reporting and Excel Basics

- Overview of financial reporting principles and their importance.
- Key financial statements: Income Statement, Balance Sheet, and Cash Flow Statement.
- Introduction to Excel: Interface, formatting, and essential shortcuts.

- Basic Excel formulas and functions for financial data entry.
- Hands-on practice: Creating and formatting simple financial tables.

Day 2

Structuring Financial Reports in Excel

- Organising financial data efficiently in Excel.
- Using cell referencing, named ranges, and data validation.
- Applying conditional formatting for improved readability.
- Introduction to PivotTables for summarising financial data.
- Hands-on practice: Building a structured financial report template.

Day 3

Essential Excel Functions for Financial Analysis

- Using SUM, AVERAGE, IF, and LOOKUP functions for financial calculations.
- Data sorting, filtering, and removing duplicates for clean datasets.
- Introduction to financial ratios and their calculations in Excel.
- Ensuring financial data integrity and accuracy.
- Hands-on practice: Analysing financial data using formulas.

Day 4

Creating Financial Statements and Data Visualisation

- Step-by-step creation of financial statements in Excel.
- Using charts and graphs to visualise financial trends.
- Introduction to financial dashboards for performance tracking.
- Hands-on practice: Designing a financial report with charts and summaries.

Day 5

Finalising Reports and Best Practices

- Reviewing financial reporting standards and best practices.
- Tips for improving report clarity and readability.
- Automating repetitive reporting tasks using Excel features.
- Creating a professional financial report.
- Course recap and Q&A session.

Register or ask about this course online

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