Finance & Business Acumen · FB293

# Essential Financial Reporting & Excel Skills

Online · 27 - 31 Dec 2026

| Date | Venue | Duration |
|---|---|---|
| **27 - 31 Dec 2026** | **Online** | **1 Week** |
| Fee | Ref | Language |
| **£1,400 GBP** | **FB293** | **English** |

## Introduction

Financial reporting is a crucial skill for professionals working in finance, accounting, and business operations. A well-structured financial report enables organisations to track performance, make informed decisions, and ensure compliance with regulations. Microsoft Excel remains the most widely used tool for financial analysis and reporting due to its versatility and efficiency.

This course is designed for beginners who want to gain practical skills in financial reporting using Excel. Participants will learn the fundamental concepts of financial reporting, the principles of organising financial data, and essential Excel functions to create meaningful reports. The training will include hands-on exercises, case studies, and real-world applications to ensure participants develop the confidence to apply these skills in their professional roles.

By the end of this course, attendees will have a solid understanding of financial reporting basics, the ability to create and analyse financial data using Excel, and the skills to produce clear and concise reports for decision-making.

## Course Objectives of Essential Financial Reporting & Excel Skills

### Upon completing this programme, participants will be able to:

- Understand the fundamentals of financial reporting and its importance in business decision-making.
- Learn key financial terminologies, reporting structures, and compliance requirements.
- Develop proficiency in using Excel for financial data entry, formatting, and basic formulas.
- Gain hands-on experience in creating financial statements such as income statements, balance sheets, and cash flow statements.
- Explore data visualisation techniques in Excel to present financial data effectively.
- Learn best practices for organising and analysing financial data for accuracy and efficiency.

## Course Methodology of Essential Financial Reporting & Excel Skills

- 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 Essential Financial Reporting & Excel Skills

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

- Improved accuracy and consistency in financial reporting across departments.
- Enhanced decision-making through clear and well-structured financial data presentations.
- Increased efficiency in financial data management and reporting processes.
- Reduced errors in financial calculations and compliance-related reporting.
- Empowered employees with fundamental Excel skills to enhance productivity.

## Personal Impact of Essential Financial Reporting & Excel Skills

### 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 looking to enhance their reporting skills.
- Business professionals responsible for financial data management and reporting.
- Administrative staff who manage financial information in Excel.
- Entrepreneurs and small business owners seeking to understand financial reporting basics.
- Anyone new to financial reporting and Excel who wants to build a solid foundation.

## Course Outlines

### Day 1

### Introduction to Financial Reporting and Excel Basics

- Understanding financial reporting and its purpose.
- Overview of key financial statements: Balance Sheet, Income Statement, 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 simple tables and data entry exercises.

### Day 2

### Structuring Financial Reports in Excel

- Organising financial data efficiently in Excel.
- Understanding cell referencing, named ranges, and data validation.
- Using conditional formatting for better data presentation.
- Introduction to PivotTables for summarising financial data.
- Hands-on practice: Structuring a financial report template.

### Day 3

### Essential Excel Functions for Financial Analysis

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

### Day 4

### Creating Financial Statements and Dashboards

- Step-by-step creation of income statements and balance sheets in Excel.
- Using charts and graphs to visualise financial data.
- Introduction to financial dashboards and KPI tracking.
- Hands-on practice: Designing an interactive financial dashboard.

### Day 5

### Finalising Reports and Best Practices

- Review of financial reporting principles.
- Tips for improving report clarity and readability.
- Automating repetitive tasks using Excel functions.
- Creating a professional financial report.
- Course recap and Q&A session.

### Register or ask about this course online

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