

Effective Dashboard & Communication of Financial Reports & Performance Analysis to Senior Management & Board Members

Target Audience

This workshop is aimed at CFOs, VPs, MDs, GMs, Chief Accountants, Cost Controllers, Directors, Managers and Analysts, involved in:

- Financial Planning and Reporting
- Financial Management / Finance Business Partners / Capital Planning Management
- Performance Reporting
- Business Planning / Strategic Planning / Business Development
- Budgeting, Forecasting & Analysis
- Management Accounting / Revenue Accounting and Controls
- Governance / Statutory & Regulatory Reporting / Policy Planning
- Corporate Financing
- Portfolio Management
- Auditing & Internal Control
- Product Control

As well as individuals from other departments who wish to present and communicate substantial amounts of data in a clear and concise way to positively influence the strategic direction of their organization.

Course Overview

This workshop examines the key ingredients to creating an effective dashboard that can be used to control the business and deliver the strategic goals. It also provides participants with the knowledge and key skills to communicate complex information and challenging data in a clear and effective manner.

Topics Covered

Day 1 - creating a good dashboard with effective graphs / visual tools & preparation work

- Key elements of a good dashboard
- Report, inform, guide or advise?
- Data: your friend and your enemy
- Data v pictures
- Pie charts, line diagrams & bar charts
- Flow diagrams & alternative visuals
- Data: summary v detail

- Structuring the Report
- Root cause analysis: from what to why
- RAG reporting: setting the triggers
- Budgets, forecasts, projects, prior years: month, year to date and full year: how to drown in data.
- Simplify to magnify
- Strategic goals & staying on track

Day 2 - presentation skills

- Understanding the communication model
- Key objectives of presentation: engage, inform & move
- Rationality v Logical decision making
- Assessing the audience: identifying your allies and resisters
- Structuring the argument
- Key delivering concepts: WRD & RIP
- Death by powerpoint: key dos & donts in presenting
- Verbal & non verbal communication: creating the right overall impression
- Taking questions & dealing with set backs: creating confidence in uncertainty
- Opportunity to practice & review (video)

Learning Objectives

By the end of the workshop, delegates will be able to create a KPI & KFI dashboard for their business – clearly measuring progress towards strategic goals – and have the confidence to articulate their findings clearly through a presentation.

Duration

2 days