informatech



ACCOUNTING AND FINANCE | COURSE

Professional Skills for Finance and Accounting

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Course content

Why Attend

This course covers the essential skills needed for finance staff to excel in their companies. From macro level management and financial overview to personal organization and time management, various skills are put into practice to help participants become more successful at the workplace.

This course relies on a variety of individual and team exercises supported with role plays as well as individual and group presentations and Excel workshops.

By the end of the course, participants will be able to:

• Identify the relationship between the various financial statements

• Explain the characteristics of 'delegation' and apply various personal organization management techniques

• Evaluate skills and attitudes of finance staff and identify their communication personality styles

• Practice some of the essential Excel skills to increase efficiency and productivity

• Apply finance policies and procedures to add value and communicate effectively with other departments

Financial managers, financial controllers, finance department heads, chief financial officers, accounting managers, senior finance officers, accountants, finance staff and analysts.

• Interpreting financial statements

• Delegation

• Communication

• Organization

• Time management

Course outline

The macro finance picture

• Understanding the accounting cycle

• The income statement



Course content

Course outline

- The balance sheet
- Changes in owners' equity statements
- Cash flow statements
- The relationship of financial statements
- Functions of management
- Elements of a vision for finance and accounting department
- Effectiveness versus efficiency
- Supporting the operating departments
- Purpose of the finance and accounting function

Personal organization and time management

- The new skills set
- Delegation and priorities
- Delegation characteristics
- Rules of delegation
- Handling meetings effectively
- Maintaining clean desk policy
- Managing your in-box
- Peak performance time

Managing the finance function

- Hiring the best people
- Identifying recruitment criteria
- Developing interviewing skills



Course content

Course outline

- Interpersonal communication
- Fundamentals of communication skills
- Personality communication styles
- The attitude and skills matrix
- Evaluating finance staff performance
- Employee motivation tools

Key Excel functions and tools to enhance efficiency

- Consolidating multiple sets of data
- Applying control at the data entry through data validation
- Reconciling accounts by using 'vlookup'

Organizing the finance function

- Teamwork skills in finance and accounting
- Assessing the need for team building program
- Finance as a project
- Organizing by function
- Organizing by purpose
- Staff duties and responsibilities
- The need for review and authorization procedures
- The authorization matrix and control of processes in organizations
- Cross training and backup strategies
- Scheduling the monthly accounting cycle



Course content

Course outline

Policies and procedures

- Purposes of the policies and procedures manual
- Documenting and communicating financial policies
- Staff involvement and responsibilities



Seminar dates

Available seminar dates

Live dates and pricing for Professional Skills for Finance and Accounting generated from the course details page.

Date	Location	Format	Fee
16 - 20 November 2026	Istanbul - Turkey	Classroom	**€2,280.-**
7 - 11 December 2026	Vienna - Austria	Classroom	**€3,400.-**
11 - 15 January 2027	Barcelona - Spain	Classroom	**€3,080.-**
8 - 12 February 2027	Rome - Italy	Classroom	**€3,400.-**
8 - 12 March 2027	Geneva - Switzerland	Classroom	**€4,200.-**
12 - 16 April 2027	Madrid - Spain	Classroom	**€3,400.-**
10 - 14 May 2027	London - U.K	Classroom	**€3,360.-**
14 - 18 June 2027	Istanbul - Turkey	Classroom	**€2,280.-**
12 - 16 July 2027	Vienna - Austria	Classroom	**€3,400.-**
9 - 13 August 2027	Barcelona - Spain	Classroom	**€3,080.-**
13 - 17 September 2027	Rome - Italy	Classroom	**€3,400.-**
11 - 15 October 2027	Geneva - Switzerland	Classroom	**€4,200.-**
8 - 12 November 2027	Madrid - Spain	Classroom	**€3,400.-**
13 - 17 December 2027	London - U.K	Classroom	**€3,360.-**

Live online option	Online delivery is available at €1,850.-.