



ACCOUNTING AND FINANCE | AF-041

Management Reporting and KPIs for Finance

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Course content

Why Attend

Management reports should help leaders understand performance and decide what to do next. Many finance packs are long, backward-looking and hard to act on.

This Aractech course covers management reporting principles, KPI selection, financial and non-financial measures, report design, variance commentary, rolling forecasts in reporting, dashboards and automating the reporting cycle. Participants redesign a management report pack.

Course Methodology

- Report redesign workshop
- KPI exercises
- Case studies
- Group discussions
- Reviews

Course Objectives

- Apply management reporting principles
- Select financial and non-financial KPIs
- Design concise management reports
- Write insightful variance commentary
- Integrate forecasts into reporting
- Automate and improve reporting processes

Target Audience

- Management accountants
- Financial controllers

Course content

- FP&A analysts
- Finance business partners

Course outline

Detailed course outline

Day-by-day outline for Management Reporting and KPIs for Finance.

Day 1 - Reporting Principles

- 09:00-09:39 | Purpose of management reporting
- 09:39-10:18 | Users
- 10:18-10:56 | Common problems
- 10:56-11:00 | Best practice
- 11:00-11:30 | Coffee break
- 11:30-12:43 | Best practice (continued)
- 12:43-14:00 | Exercise: Report critique

Day 2 - KPIs

- 09:00-09:45 | Financial KPIs
- 09:45-10:30 | Operational KPIs
- 10:30-11:00 | Leading indicators
- 11:00-11:30 | Coffee break
- 11:30-11:45 | Leading indicators (continued)
- 11:45-12:30 | Targets
- 12:30-14:00 | Workshop: KPI selection

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Day 3 - Report Design

- 09:00-09:45 | Structure
- 09:45-10:30 | Visuals
- 10:30-11:00 | One-page summaries
- 11:00-11:30 | Coffee break
- 11:30-11:45 | One-page summaries (continued)
- 11:45-12:30 | Exception reporting
- 12:30-14:00 | Lab: Report redesign

Day 4 - Commentary and Forecasts

- 09:00-09:45 | Variance commentary
- 09:45-10:30 | Insight
- 10:30-11:00 | Forecasts
- 11:00-11:30 | Coffee break
- 11:30-11:45 | Forecasts (continued)
- 11:45-12:30 | Actions
- 12:30-14:00 | Exercise: Writing commentary

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Day 5 - Process and Automation

- 09:00-09:54 | Reporting calendar
- 09:54-10:48 | Data
- 10:48-11:00 | Automation
- 11:00-11:30 | Coffee break
- 11:30-12:12 | Automation (continued)
- 12:12-13:06 | Continuous improvement
- 13:06-14:00 | Capstone: Reporting pack

Seminar dates

Available seminar dates

Live dates and pricing for Management Reporting and KPIs for Finance generated from the course details page.

Date	Location	Format	Fee
9 - 13 November 2026	Vienna	Classroom	€3,225
14 - 18 December 2026	Barcelona	Classroom	€2,815
18 - 22 January 2027	Rome	Classroom	€3,460
15 - 19 February 2027	Geneva	Classroom	€4,315
15 - 19 March 2027	Madrid	Classroom	€3,400
19 - 23 April 2027	London	Classroom	€2,315
17 - 21 May 2027	Istanbul	Classroom	€1,978
21 - 25 June 2027	Cape Town	Classroom	€1,625
19 - 23 July 2027	Barcelona	Classroom	€2,815
16 - 20 August 2027	Rome	Classroom	€3,460

Seminar dates

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Date	Location	Format	Fee
20 - 24 September 2027	Geneva	Classroom	€4,315
18 - 22 October 2027	Dubai	Classroom	€1,845
15 - 19 November 2027	London	Classroom	€2,315
20 - 24 December 2027	Istanbul	Classroom	€1,978
9 - 13 November 2026	Online / Live	Online / Live	€1,815
14 - 18 December 2026	Online / Live	Online / Live	€1,815
18 - 22 January 2027	Online / Live	Online / Live	€1,815
15 - 19 February 2027	Online / Live	Online / Live	€1,815
15 - 19 March 2027	Online / Live	Online / Live	€1,815
19 - 23 April 2027	Online / Live	Online / Live	€1,815

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Date	Location	Format	Fee
17 - 21 May 2027	Online / Live	Online / Live	€1,815
21 - 25 June 2027	Online / Live	Online / Live	€1,815
19 - 23 July 2027	Online / Live	Online / Live	€1,815
16 - 20 August 2027	Online / Live	Online / Live	€1,815
20 - 24 September 2027	Online / Live	Online / Live	€1,815
18 - 22 October 2027	Online / Live	Online / Live	€1,815
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