Case Study

Training In Financial Presentation Methods

AD PUNCTUM | Training

Background

Financial data prepared by analysts was correct but often unsuitable for submission to senior management. Middle management were spending significant time re-writing reports and presentations.

What Was Done

Prepared and delivered a short training course covering:

- "The right way" of formatting data and tabulation
- What senior management want from reporting
- Explanation of more complex analytical methods
- How to simplify analysis without losing nuance
- How to present recommendations

How It Was Done

- Prepared content based on feedback from team experts and then conducted testing to ensure it was easily understood
- Delivered course over 2 sessions to allow the analysts to use the methods covered in the 1st session
- A presentation and hand-out were created

The End Result

- Delivered to a global team of more than 100 analysts through a number of classroom and remote sessions
- Positive feedback from both attendees and management teams