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COURSE BROCHURE

# Finance Automation and Digitisation Roadmap Training Course

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**jupiterprime.uk**

info@jupiterprime.uk

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# Finance Automation and Digitisation Roadmap Training Course

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Finance Automation and Digitisation Roadmap is a 1-week training course for finance process owners, controllers and transformation leads, who build a finance digitisation roadmap that sequences automation candidates, close improvements and reporting changes. Finance functions face rising transaction volumes, tighter reporting timetables and pressure to release accountants from manual reconciliation work. Jupiter Prime Training sets finance automation and digitisation roadmap planning within the ledger, the close calendar and the reporting cycle.

## Why Finance Automation and Digitisation Roadmap Matters Now

Three forces shape finance digitisation today: cloud ledgers that expose structured transaction feeds, software robots that can repeat rule-based keying and matching, and business partners who expect self-service dashboards instead of static month-end packs. A finance function that sequences these changes well shortens its close, reduces posting errors and frees analysts for forecasting and commentary. One that buys tools without a roadmap ends up with fragile scripts, duplicated spreadsheets and staff who quietly return to manual workarounds. The course rests on process mapping, automation candidate scoring, benefit tracking and structured change adoption.

## Who Gains Most from Finance Automation and Digitisation Roadmap

- Process owners responsible for purchase-to-pay, order-to-cash and record-to-report cycles
- Controllers accountable for the close calendar, journals and balance sheet reconciliations
- Reporting leads who design management packs and performance dashboards
- Finance systems specialists who configure the ledger, interfaces and master data
- Transformation leads who prepare investment cases for finance technology

Finance leadership teams gain most when a controller, a process owner and a systems specialist attend together and agree one sequence of change.

## Finance Automation and Digitisation Roadmap Capabilities

Participants move from scattered automation ideas to a ranked, costed and owned sequence of finance changes.

- Map current finance processes to locate manual keying, rework and hand-offs — process owners
- Score automation candidates on volume, rule stability and exception rates — the investment committee
- Design a faster close calendar with automated reconciliations and journals — the financial controller
- Specify dashboards that replace static management packs — business partners and budget holders
- Calculate costs, benefits and payback for finance technology — the chief financial officer
- Build a phased roadmap with owners, milestones and adoption measures — the finance leadership team

## Key Finance Automation and Digitisation Roadmap Terms

- Robotic process automation — software that repeats rule-based keyboard and screen tasks, such as keying invoices or copying ledger balances.
- Automation candidate — a finance task assessed for automation by its volume, rule stability, exception rate and data quality.
- Digital close — a month-end close run with automated reconciliations, scheduled journals and a monitored task checklist.
- Continuous reconciliation — matching transactions between ledgers, banks and subledgers daily rather than only at period end.
- Self-service reporting — dashboards that let budget holders explore finance figures without requesting a new spreadsheet.
- Benefit realisation — tracking whether a finance technology change delivers the hours, accuracy and speed promised in its case.

## Finance Automation and Digitisation Roadmap Day by Day

### Day 1: The Digital Finance Landscape

- Finance Operating Model Review — Where Manual Effort Sits Today
- Cloud Ledger and Subledger Architecture — Data Available for Automation
- Finance Process Maturity Scale — Setting the Starting Point
- Stakeholder Expectations Map — Business Partners, Auditors and Treasury
- Manual Effort Baseline — Hours, Errors and Rework by Process

### Day 2: Mapping and Scoring Automation Candidates

- Swimlane Mapping of Purchase-to-Pay — Spotting Keying and Hand-Offs
- Order-to-Cash Cash Application Review — Matching Rules and Exceptions
- Software Robot Suitability Matrix — Rule Stability Versus Judgement
- Candidate Scoring Sheet — Volume, Exception Rate and Data Quality
- Controls Impact Check — Segregation of Duties After Automation

## Day 3: Designing the Digital Close

- Close Calendar Redesign — Moving Tasks Before Period End
- Automated Bank and Intercompany Reconciliation — Daily Matching Choices
- Recurring and Accrual Journal Templates — Reducing Manual Postings
- Close Task Checklist Monitoring — Ownership and Escalation Points
- Variance Commentary Workflow — Faster Review by Controllers

## Day 4: Visualisation and the Technology Case

- Dashboard Design for Management Packs — Which Measures Budget Holders Need
- Finance Data Model and Master Data Rules — Trusted Reporting Figures
- Technology Cost Build-Up — Licences, Integration and Support Effort
- Benefit Quantification — Hours Released, Errors Avoided, Days Saved
- Payback and Sensitivity Table — Ranking Competing Investments

## Day 5: Practising the Finance Digitisation Roadmap

- Change Adoption Plan — Training, Champions and Retiring Old Spreadsheets
- Applying Candidate Scores — Selecting the First Three Automations
- Applying the Close Redesign — Milestones for a Shorter Close
- Applying the Benefit Model — Tracking Measures for Each Phase
- Finance Digitisation Roadmap — Phases, Owners and Decision Gates

## Applying Finance Automation and Digitisation Roadmap After the Course

- Lead a scoring session on ten high-volume finance tasks using the candidate scoring sheet and agree the first automation.
- Run a close calendar review with controllers and move two reconciliation tasks into daily continuous matching.

## Finance Automation and Digitisation Roadmap Questions FAQ

### What is finance automation and digitisation roadmap planning and why does it matter now?

It is the practice of ranking, costing and sequencing finance automation, close and reporting changes. It matters now because ledgers, software robots and dashboards are widely available, yet without a sequence they produce fragile scripts and duplicated spreadsheets instead of a faster, more accurate finance function.

### Which roles gain most from finance automation and digitisation roadmap training?

Process owners, controllers, reporting leads, finance systems specialists and transformation leads gain most. Together they can agree which finance tasks to automate first.

## How does finance automation and digitisation roadmap training differ from a general digital transformation course?

It stays inside the finance function. Rather than enterprise-wide strategy, you work on purchase-to-pay, order-to-cash, reconciliations, journals and management packs, scoring real finance tasks and building a case that a chief financial officer can approve.

## What will you bring back from finance automation and digitisation roadmap training?

You bring back a phased plan for your finance function. It lists scored automation candidates, a redesigned close calendar, dashboard priorities, a payback table and adoption measures, each with an owner and a decision gate.

## Finance Automation and Digitisation Roadmap: The Way Forward

The finance digitisation roadmap first informs which three automation candidates receive funding in the next budget cycle. Controllers, process owners and the chief financial officer use it to track milestones and released hours. After the first phase, revisit the candidate scores and benefit measures once the earliest automations are running.