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COURSE BROCHURE

Advanced Accountant and Auditor Performance Development Training Course

21 June – 2 July 2027
New York

Advanced Accountant and Auditor Performance Development Training Course

Ref: 373_13223 **Date:** 21 June – 2 July 2027 **Location:** New York **Fees:** 14000 GBP

Accountant and Auditor Performance Development is an advanced 2-week training course for accountants, auditors and finance team leaders, built around one work product: a Finance Professional Growth Plan combining a competency gap profile, performance goals and a continuing professional development log. Automation is absorbing routine bookkeeping and testing, so the value of finance professionals now rests on judgement, analysis and communication. Jupiter Prime Training created this course for professionals making that shift.

Why Accountant and Auditor Performance Development Matters Now

Three pressures are changing what good performance looks like in finance and audit. Automation and analytics tools now handle reconciliations and sample selection, leaving people to interpret results and challenge assumptions. Business partners expect accountants and auditors to explain numbers in plain language and influence decisions. Skilled professionals also expect visible development paths, and teams that ignore this lose them. Organisations that build analytical depth, professional scepticism and communication skills get faster closes, sharper findings and stronger retention; those that do not see repeated errors and disengaged staff. The course also draws on the evidence expectations of the Global Internal Audit Standards from The Institute of Internal Auditors IIA.

Who Gains Most from Accountant and Auditor Performance Development

- Senior accountants responsible for month-end close quality and management reporting
- Internal and external auditors who interpret test results and draft findings
- Finance team leaders who set goals, give feedback and approve development requests
- Financial analysts who build models and dashboards for business partners
- Audit supervisors who coach junior staff through reviews and client meetings

A finance or audit team leader attending with two direct reports gains most, because goals, feedback routines and development plans can be agreed and launched at once.

Accountant and Auditor Performance Development Capabilities

The outcomes combine technical sharpness with the habits that make finance professionals influential.

- Apply ratio, trend and variance techniques to explain financial movements — budget holders
- Test assumptions with professional scepticism before accepting explanations — reliability of reports and findings
- Build data visualisations that make numbers readable for non-specialists — executives
- Communicate findings and recommendations persuasively in writing and meetings — business partners
- Specify performance goals and feedback routines for finance staff — team leaders
- Design a personal development log tied to a competency framework — career progression decisions

Key Accountant and Auditor Performance Development Terms

- Competency framework — a structured description of the technical, analytical and behavioural skills expected at each level of a finance or audit role.
- Continuing professional development — ongoing, recorded learning that keeps a qualified professional's knowledge and skills current.
- Variance analysis — comparing actual results with budget or forecast and explaining the causes of differences.
- Professional scepticism — an attitude of questioning evidence and explanations rather than accepting them at face value.
- Data storytelling — combining numbers, visuals and narrative so an audience grasps the meaning of financial information quickly.
- Coaching conversation — a structured discussion in which a leader helps a team member set goals, explore options and commit to action.

Accountant and Auditor Performance Development Day by Day

Day 1: The Changing Role of Finance Professionals

- Automation Impact Mapping — Tasks Shifting From People to Systems
- Business Partner Expectations Survey — What Stakeholders Want From Finance
- Finance and Audit Competency Frameworks — Levels and Behaviours
- Personal Competency Self-Assessment — Strengths and Development Gaps
- Career Pathway Options — Technical Specialist Versus Leadership Routes

Day 2: Analytical Thinking for Accountants

- Ratio and Trend Analysis — Signals Behind Financial Statements
- Variance Analysis Techniques — Price, Volume and Mix Effects
- Cost Behaviour Analysis — Fixed, Variable and Step Costs
- Working Capital Diagnostics — Receivable, Payable and Inventory Days
- Analytical Review Procedures — Expectations Versus Recorded Amounts

Day 3: Judgement and Professional Scepticism

- Cognitive Bias Awareness — Anchoring, Confirmation and Overconfidence
- Corroborating Management Explanations — Independent Evidence Sources
- Estimates and Assumptions Challenge — Provisions, Impairments and Forecasts
- Ethical Dilemma Scenarios — Pressure to Adjust Numbers
- Documenting Professional Judgement — Rationale Others Can Follow

Day 4: Data Tools for Finance and Audit

- Spreadsheet Modelling Discipline — Structure, Checks and Version Control
- Data Cleansing Techniques — Duplicates, Blanks and Format Errors
- Pivot and Lookup Analysis — Fast Answers From Large Ledgers
- Dashboard Design Principles — Choosing Charts for Financial Data
- Automated Reconciliation Routines — Freeing Time for Analysis

Day 5: Communicating Numbers With Impact

- Data Storytelling Structure — Message, Evidence and Implication
- Report Writing for Non-Financial Readers — Plain Language Choices
- Presenting Results to Executives — Concise Briefings and Visual Aids
- Handling Challenging Questions — Staying Factual Under Pressure
- Writing Audit Findings That Persuade — Impact-Led Recommendations

Day 6: Influence and Stakeholder Relationships

- Stakeholder Mapping for Finance Teams — Influence and Interest Grid
- Negotiating Deadlines and Information Requests — Win-Win Agreements
- Constructive Challenge Techniques — Disagreeing Without Damaging Trust
- Cross-Functional Collaboration — Finance in Operational Projects
- Building Credibility as an Adviser — Reliability and Responsiveness

Day 7: Personal Productivity and Workload

- Month-End and Audit Peak Planning — Critical Path Scheduling
- Prioritisation Matrices — Urgent Versus Important Tasks
- Focus Time Blocking — Protecting Analytical Work From Interruptions
- Process Improvement Quick Wins — Removing Repeated Manual Steps
- Stress and Resilience Habits — Sustaining Performance in Busy Seasons

Day 8: Setting Goals and Giving Feedback

- Performance Goal Writing — Specific, Measurable and Role-Linked
- Quality and Timeliness Indicators for Finance Work — Fair Measures
- Feedback Conversation Models — Situation, Behaviour and Impact
- Recognising Contribution — Non-Financial Motivation Tools
- Addressing Underperformance — Support Plans and Clear Expectations

Day 9: Coaching and Continuing Professional Development

- Coaching Conversations for Finance Leaders — Questions That Build Capability
- On-the-Job Learning Design — Stretch Assignments and Shadowing
- Continuing Professional Development Logs — Planning and Recording Learning
- Mentoring Arrangements — Matching Mentors With Development Needs
- Knowledge Sharing Routines — Lunch-and-Learn and Review Debriefs

Day 10: Practising the Finance Professional Growth Plan

- Competency Gap Profile — Applying Self-Assessment Against the Framework
- Analytical Case Presentation — Applying Variance Analysis and Data Storytelling
- Peer Coaching Round — Applying Coaching and Feedback Techniques
- Productivity Commitments — Applying Prioritisation and Time Blocking
- Finance Professional Growth Plan — Goals, Learning Actions and Review Points

Applying Accountant and Auditor Performance Development After the Course

- Run the competency self-assessment with each team member and agree three development goals linked to the framework.
- Rebuild one recurring management report using data storytelling principles and gather feedback from its main readers.

Accountant and Auditor Performance Development Questions FAQ

What is accountant and auditor performance development, and why does it matter now?

It is the deliberate growth of analytical, judgement, communication and productivity skills in finance and audit professionals. It matters now because automation handles routine tasks and organisations need people who interpret numbers and influence decisions.

Which roles gain most from accountant and auditor performance development training?

Senior accountants, auditors, financial analysts and finance team leaders gain most. They produce reports and findings that others rely on and shape how their teams learn and perform.

How does accountant and auditor performance development training differ from a technical accounting update course?

A technical update covers changes in accounting or auditing rules. This course develops the analytical habits, scepticism, communication, productivity and coaching skills that determine how well professionals apply any rule.

What do you bring back from accountant and auditor performance development training?

You bring back a personal growth plan with competency gaps, goals and a development log, plus analysis templates, a report structure and coaching questions you can use with your team.

Accountant and Auditor Performance Development: The Way Forward

The Finance Professional Growth Plan first informs the next performance review conversation between participant and line manager. Team leaders use it to allocate stretch assignments and training budgets. After one review cycle, revisit the competency profile to see which gaps closed through on-the-job learning and which need formal development or a mentor.