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COURSE BROCHURE

# Finance Team Training Needs Analysis Course

19 – 23 September 2027
Sharm El-Sheikh

# Finance Team Training Needs Analysis Course

**Ref:** 900_33966 **Date:** 19 – 23 September 2027 **Location:** Sharm El-Sheikh **Fees:** 4500 GBP

Finance Team Training Needs Analysis is a 1-week training course for finance and accounting team leaders and L&D partners who must decide where development effort will most improve the month-end close and reporting quality, and it builds a Finance Skills Gap Heatmap. Rising automation, tighter reporting timetables and thin finance benches make a precise reading of skill gaps a planning priority. Jupiter Prime Training delivers Finance Team Training Needs Analysis.

## Why Finance Team Training Needs Analysis Matters Now

Three forces shape finance capability today: automation of reconciliations and journals, which shifts effort from posting towards review and judgement; shorter close calendars demanded by boards and lenders; and a smaller pool of experienced accountants. A finance function that reads its gaps accurately spends development budget where errors and late adjustments actually arise. The course rests on ISO 10015:2019 for competence management and people development and on ISO 30422:2022 for learning and development process, adapted to accounting roles and close tasks.

## Who Gains Most from Finance Team Training Needs Analysis

- Leaders accountable for the month-end and year-end close timetable and its sign-offs
- Leaders responsible for management reporting packs and variance commentary
- Owners of accounts payable, receivable and treasury operations with recurring exceptions
- L&D partners who allocate development budget across finance specialisms
- Controllers who review reconciliation quality and audit adjustments

A finance leadership group that attends with its L&D partner gains most, sharing one scoring scale.

## Finance Team Training Needs Analysis Capabilities

Participants turn close errors, audit points and role expectations into scored, ranked development needs for accounting staff.

- Build a finance competency matrix — the controller setting role expectations
- Assess proficiency — the team leader rating staff fairly
- Calculate weighted skill gap scores that combine proficiency shortfall with task risk — the L&D partner ranking needs
- Distinguish skill gaps from process, system and workload causes — the finance director deciding what training cannot fix
- Specify impact indicators such as close duration, late adjustments and reporting rework — the CFO judging development spend
- Communicate a heatmap of priority gaps — the leadership group approving the plan

## Key Finance Team Training Needs Analysis Terms

- Competency matrix — a grid listing each finance role against the technical and behavioural skills it requires and the proficiency expected.
- Proficiency scale — a defined set of levels, from awareness to expert, used to rate each skill consistently across assessors.
- Weighted gap score — the difference between required and current proficiency, multiplied by how critical the task is to close accuracy.
- Close error log — a running record of corrections, late journals and reconciling items found during or after the period close.
- Root cause triage — sorting a performance problem into skill, process, system or capacity causes before choosing any response.
- Impact indicator — a measurable finance result, such as close duration or reporting rework, tracked before and after development.

## Finance Team Training Needs Analysis Day by Day

### Day 1: Finance Capability in Context

- Close Calendar Pressures — Where Capability Limits Reporting Speed
- Automation of Reconciliations — Shifting Skills From Posting to Review
- ISO 10015 Competence Principles — Linking Finance Roles to Development
- ISO 30422 Learning Process — Structuring Needs Analysis Within L&D
- Finance Stakeholder Map — Who Owns Each Capability Decision

### Day 2: Building the Finance Competency Matrix

- Role Profiles for Accounting Specialisms — Defining Expected Skill Sets
- Technical Accounting Skill Clusters — Separating Standards, Systems and Judgement
- Proficiency Scale Design — Rating Skills Consistently Across Assessors
- Task Criticality Weighting — Linking Skills to Close Risk
- Matrix Validation With Controllers — Agreeing Expectations Before Scoring

### Day 3: Gathering Proficiency Evidence

- Close Error Log Mining — Locating Recurring Correction Patterns
- Reconciliation File Sampling — Rating Quality of Finished Work
- Audit Adjustment Review — Tracing External Findings to Skills
- Structured Observation of Journals — Rating Judgement in Practice
- Root Cause Triage — Separating Skill, Process and System Causes

### Day 4: Scoring Gaps and Choosing Responses

- Weighted Gap Score Calculation — Ranking Needs by Close Risk
- Team Versus Individual Gaps — Choosing Group or Personal Responses
- Response Options Beyond Courses — Coaching, Job Aids and Rotation
- Impact Indicator Selection — Close Duration, Late Journals and Rework
- Baseline and Follow-Up Measurement — Judging Change in Reporting Quality

## Day 5: Practising the Finance Skills Gap Heatmap

- Applied Matrix Scoring — Rating a Sample Accounts Payable Team
- Evidence Reconciliation Exercise — Resolving Conflicting Proficiency Ratings
- Gap Prioritisation Panel — Defending Rankings to a Finance Director
- Impact Tracking Plan — Assigning Indicators and Review Points
- Finance Skills Gap Heatmap — Completing and Presenting the Final Version

## Applying Finance Team Training Needs Analysis After the Course

- Score one finance team against the competency matrix using a month of close error log entries.
- Agree baseline values for close duration and late adjustments with the controller before any development response begins.

## Finance Team Training Needs Analysis Questions FAQ

### What is finance team training needs analysis and why does it matter now?

Finance team training needs analysis is the scoring of accounting skills against role expectations to find gaps that cause close errors. It matters now because automation and shorter close calendars change which skills finance staff need.

### Which roles gain most from finance team training needs analysis?

Finance and accounting team leaders gain most, together with the L&D partners who support them. Controllers use the matrix to rate staff, while L&D partners use the scores to rank needs.

### How does finance team training needs analysis differ from a general needs analysis course?

It differs by focusing on one function and its measurable results. A general course covers needs analysis across all departments, while this one works with close error logs, reconciliation samples and reporting indicators that only finance teams hold.

### What do you bring back from finance team training needs analysis?

You bring back a scored competency matrix and a heatmap of priority gaps. It ranks needs by close risk and names indicators that show whether development improved close accuracy.

## Finance Team Training Needs Analysis: The Way Forward

The Finance Skills Gap Heatmap first informs which accounting skills receive development budget in the coming quarter. Controllers use it to rate staff, L&D partners use it to sequence responses and finance directors use it to approve spend. After the first close cycle, revisit the task criticality weights, since automation may have moved risk to different tasks.