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COURSE BROCHURE

Finance Team Leadership for Close and Budget Cycles Training Course

24 January – 4 February 2027
Online

Finance Team Leadership for Close and Budget Cycles Training Course

Ref: 1642_60194 **Date:** 24 January – 4 February 2027 **Location:** Online **Fees:** 3200 GBP

Finance Team Leadership for Close and Budget Cycles is a 2-week advanced training course for finance managers and finance team leaders, and each participant builds a finance team operating playbook covering goals, close and budget calendars, capacity, coaching and team cost. Automation, tighter reporting deadlines and scarce accounting talent are changing what finance leaders must manage. Jupiter Prime Training built it around the people and workload decisions that recur every period.

Why Finance Team Leadership for Close and Budget Cycles Matters Now

Three forces press on finance leaders: automation and shared services that change which tasks accountants perform, shorter close and reporting deadlines demanded by boards and lenders, and a tight market for qualified accountants that raises the cost of attrition. A finance function that plans capacity around its close and budget calendar, coaches deliberately and delegates review work keeps deadlines without burning out its people; one that leads by heroics loses accuracy and staff. The course draws on objectives and key results OKR, the RACI responsibility matrix, situational leadership, the GROW coaching model and activity-based costing ABC for finance function cost.

Who Gains Most from Finance Team Leadership for Close and Budget Cycles

- Financial controllers who own the month-end and year-end close timetable
- Budget and planning leads who coordinate submissions across business units
- Accounting team leaders who review journals, reconciliations and schedules
- Shared service centre supervisors who manage transactional finance queues
- Finance business partner leads who allocate analysts to stakeholder requests

A finance leadership group that attends with controllers and planning leads together gains most, because close and budget peaks collide in the same weeks and only a shared capacity view lets them rebalance people across both.

Finance Team Leadership for Close and Budget Cycles Capabilities

Participants learn to translate the finance calendar into goals, staffing and coaching choices, so that close quality, budget timeliness and team wellbeing are managed as one system.

- Design team goals and OKRs that link close accuracy and budget timeliness to finance strategy — the finance director
- Build a capacity model that matches accountant hours to close and budget peaks — staffing and overtime decisions
- Apply the GROW model in coaching conversations with accountants and analysts — individual development plans
- Specify delegation and review levels with a RACI matrix for close tasks — controllers and auditors
- Calculate finance function cost per transaction and per close day — the cost-to-run decision
- Communicate performance feedback and ratings fairly across a finance team — HR business partners

Key Finance Team Leadership for Close and Budget Cycles Terms

- Close calendar — the day-by-day schedule of tasks, owners and deadlines that takes the books from period end to signed reporting.
- Fast close — reducing the days needed to finish the period-end close while keeping reconciliation and review quality.
- Capacity model — a view of available team hours against forecast workload by week, used to plan staffing and overtime.
- RACI matrix — a chart showing who is responsible, accountable, consulted and informed for each finance task.
- GROW model — a coaching structure moving through goal, reality, options and way forward in a development conversation.
- Finance cost per transaction — total finance function cost divided by the volume of invoices, journals or reports processed.

Finance Team Leadership for Close and Budget Cycles Day by Day

Day 1: The Finance Leader's Operating Context

- Finance Operating Model Map — Locating Team Roles Across Record, Report and Advise
- Automation and Shared Services Trends — Redesigning Accountant Roles
- Finance Calendar Mapping — Identifying Close, Budget and Audit Peaks
- Leadership Style Diagnostic — Choosing Directive or Coaching Approaches
- Stakeholder Expectations of Finance — Balancing Board, Auditor and Business Demands

Day 2: Setting Finance Team Goals

- Finance Strategy Cascade — Linking Team Goals to Function Priorities
- Objectives and Key Results for Finance — Measuring Close and Budget Outcomes
- Close Quality Indicators — Tracking Adjustments, Late Journals and Errors
- Budget Process Indicators — Tracking Submission Timeliness and Revisions
- Team Charter and Working Agreements — Clarifying Norms During Peak Periods

Day 3: Leading the Close Cycle

- Close Calendar Design — Sequencing Tasks, Owners and Cut-Offs
- Fast Close Techniques — Removing Bottlenecks Without Losing Control
- Reconciliation Review Hierarchy — Assigning Preparer and Reviewer Levels
- Daily Close Stand-Ups — Escalating Blockers Before Deadlines Slip
- Post-Close Retrospective — Capturing Lessons for the Next Period

Day 4: Leading the Budget Cycle

- Budget Timetable and Submission Gates — Coordinating Business Unit Inputs
- Budget Owner Support Model — Allocating Analysts to Cost Centres
- Challenge Session Facilitation — Managing Conflict Over Assumptions
- Rolling Forecast Rhythm — Spreading Planning Effort Across the Year
- Budget Pack Quality Checks — Protecting Credibility With Executives

Day 5: Workload and Capacity Planning

- Capacity Model Construction — Matching Hours to Weekly Workload
- Peak Load Levelling — Shifting Tasks Away From Close Weeks
- Overtime and Temporary Staffing Rules — Controlling Burnout and Cost
- Cross-Training Matrix — Reducing Single Points of Failure
- Workload Dashboard — Making Queue Ageing Visible to Managers

Day 6: Delegation and Accountability

- RACI Matrix for Close Tasks — Clarifying Ownership and Sign-Off
- Situational Leadership Model — Matching Delegation to Accountant Readiness
- Review Threshold Setting — Balancing Control Strength and Speed
- Segregation of Duties in Teams — Keeping Delegation Within Control Rules
- Escalation Protocols — Deciding What Reaches the Controller

Day 7: Coaching Accountants and Analysts

- GROW Coaching Model — Structuring Development Conversations
- Technical Skills Gap Assessment — Prioritising Accounting and Systems Training
- On-the-Job Learning Plans — Using Close Tasks as Development
- Feedback Conversations — Addressing Recurring Reconciliation Errors
- Succession Bench for Key Finance Roles — Preparing Future Controllers

Day 8: Performance Conversations and Retention

- Performance Review Calibration — Rating Accountants Fairly Across Teams
- Difficult Conversation Planning — Handling Underperformance and Missed Deadlines
- Recognition Practices for Finance Teams — Sustaining Engagement After Peaks
- Retention Risk Mapping — Protecting Scarce Qualified Staff
- Wellbeing Signals During Close — Spotting Fatigue Before Errors Appear

Day 9: Managing Finance Team Cost

- Activity-Based Costing of Finance — Pricing Close, Payables and Reporting Activities
- Finance Cost Per Transaction Benchmarks — Comparing Efficiency Over Time
- Automation Business Case — Weighing Tool Investment Against Headcount
- Shared Service and Outsourcing Options — Choosing Which Activities to Move
- Finance Function Budget — Defending Team Cost to the Executive

Day 10: Practising the Finance Team Operating Playbook

- Team Goal and OKR Set — Applying Day Two
- Integrated Close and Budget Calendar With Capacity Model — Applying Days Three to Five
- Delegation and Coaching Plan per Team Member — Applying Days Six and Seven
- Peer Review of Playbooks — Testing Choices Against Realistic Peak Scenarios
- Finance Team Operating Playbook — Final Goals, Calendars, Capacity, Coaching and Cost

Applying Finance Team Leadership for Close and Budget Cycles After the Course

- Rebuild the next close calendar with a RACI matrix and capacity model, then run daily stand-ups and a post-close retrospective.
- Hold GROW coaching conversations with each direct report and agree individual development plans tied to close and budget roles.

Finance Team Leadership for Close and Budget Cycles Questions FAQ

What is finance team leadership for close and budget cycles and why does it matter now?

It is leading accountants and analysts through recurring close and budget peaks with clear goals, capacity plans, coaching and cost control. It matters now because automation, shorter deadlines and scarce talent make heroics unsustainable.

Which roles gain most from finance team leadership for close and budget cycles?

Financial controllers, budget and planning leads, accounting team leaders, shared service supervisors and finance business partner leads gain most, in manufacturing, services or public organisations alike.

How does finance team leadership for close and budget cycles differ from a general leadership course?

A general leadership course works with any team. This course builds leadership around the finance calendar: close sequencing, budget gates, review hierarchies, segregation of duties and the cost of running the finance function.

What will I bring back from finance team leadership for close and budget cycles?

You bring back a finance team operating playbook: team goals and OKRs, an integrated close and budget calendar, a capacity model, delegation and coaching plans and a finance function cost view.

Finance Team Leadership for Close and Budget Cycles: The Way Forward

The finance team operating playbook first informs the staffing plan for the next close and budget season, where the finance director decides overtime, cross-training and review levels. Controllers and planning leads use it weekly, and team members see their goals and development steps in it. After the first peak, revisit the capacity assumptions, because automation and staff changes shift actual hours.