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COURSE BROCHURE

Finance Team Skills Gap Matrix and Development Planning Training Course

5 – 9 July 2027
New York

Finance Team Skills Gap Matrix and Development Planning Training Course

Ref: 2380_89398 **Date:** 5 – 9 July 2027 **Location:** New York **Fees:** 7900 GBP

Finance Team Skills Gap Matrix and Development Planning is a 1-week training course for finance heads and finance training leads, built around one work product: a finance team skills gap matrix with priced development actions. Automation, tighter reporting cycles and growing demand for business partnering are changing what accountants must do well. Jupiter Prime Training runs this course for leaders who must see clearly where finance capability falls short.

Why Finance Team Skills Gap Matrix and Development Planning Matters Now

Three forces shape finance capability today. Automation removes routine tasks and raises demand for systems fluency. Budget holders expect finance staff to challenge plans and explain variances, not just report them. Learning budgets are tight and must close real gaps. A function that maps skills against role profiles directs development where risk is greatest; one that relies on impressions trains the wrong people and leaves single points of failure.

Who Gains Most from Finance Team Skills Gap Matrix and Development Planning

- Finance heads accountable for the capability of accounting, reporting and planning sections
- Finance training leads who design learning paths and manage development budgets
- Financial controllers who rate staff on close, reconciliation and reporting work
- Planning leads who need stronger modelling and commentary skills

A finance leadership group that sends its controllers and training lead together gains most, leaving with one shared proficiency scale.

Finance Team Skills Gap Matrix and Development Planning Capabilities

Participants turn impressions of staff ability into scored, evidenced gaps.

- Design role profiles with target proficiency for each finance grade — guiding hiring and promotion decisions
- Build proficiency scale descriptors for technical accounting, systems, analysis and partnering — aligning assessors
- Assess staff with calibrated ratings and work samples — supporting fair development choices
- Calculate weighted gap scores by business risk — informing which shortfalls get funded first
- Weigh training, hiring and secondment options — serving workforce planning with human resources
- Specify a development budget and succession cover — protecting critical close and reporting roles

Key Finance Team Skills Gap Matrix and Development Planning Terms

- Skills gap matrix — a grid of roles against skills showing target proficiency, current rating and the gap.
- Role profile — a description of a finance role listing the skill clusters it needs and the proficiency expected for each.
- Proficiency scale — level descriptors defining what each rating of a skill looks like in practice.
- Calibration — a meeting where assessors compare ratings to remove leniency and inconsistent standards.
- Weighted gap score — the difference between target and current proficiency multiplied by the business risk of that skill.
- Succession cover — named backup staff able to perform a critical role if its holder leaves.

Finance Team Skills Gap Matrix and Development Planning Day by Day

Day 1: Finance Roles, Pressures and Skill Demand

- Finance Operating Model Mapping — Deciding Which Roles the Function Needs
- Automation and Shared Service Shifts — Anticipating Which Tasks Disappear
- Business Partnering Expectations — Defining What Budget Holders Want from Finance
- Career Path Ladders in Finance — Linking Grades to Expected Proficiency
- Stakeholder Interviews with Controllers — Surfacing Hidden Capability Concerns

Day 2: Role Profiles and Proficiency Scales

- Technical Accounting Skill Clusters — Separating Close, Consolidation and Reporting Expertise
- Finance Systems and Data Skill Clusters — Rating Ledger, Spreadsheet and Reporting Tool Fluency
- Analysis and Insight Skill Clusters — Rating Variance Commentary and Forecast Modelling
- Five-Point Proficiency Scale Descriptors — Making Ratings Consistent Across Assessors
- Target Proficiency per Role Profile — Setting the Bar for Each Grade

Day 3: Evidence-Based Skill Assessment

- Self-Rating and Manager Rating Calibration — Reducing Optimism and Leniency Bias
- Work Sample Reviews of Reconciliations and Reports — Testing Claimed Skill
- Structured Competency Interviews — Probing Judgement on Accounting Estimates
- Calibration Meetings Across Finance Sections — Resolving Rating Disputes Fairly
- Gap Scoring Formula and Weighting — Ranking Shortfalls by Business Risk

Day 4: From Gap Scores to Development Spend

- Heat Map of Gaps by Role and Section — Spotting Concentrated Exposure
- Build, Buy or Borrow Choices — Choosing Training, Hiring or Secondment
- Learning Path Design with Rotations and Coaching — Closing Gaps on the Job
- Development Budget Allocation per Gap — Matching Spend to Risk Priority
- Succession Cover for Critical Finance Roles — Protecting Close and Reporting Deadlines

Day 5: Practising the Finance Team Skills Gap Matrix

- Role Profile Set for a Sample Finance Function — Applying Day 2 Scales
- Assessed Ratings with Calibration Notes — Applying Day 3 Evidence Methods
- Prioritised Development Actions and Costs — Applying Day 4 Budget Choices
- Peer Challenge from Fellow Finance Heads — Testing Fairness and Realism
- Finished Finance Team Skills Gap Matrix — Setting Owners, Review Dates and Spend

Applying Finance Team Skills Gap Matrix and Development Planning After the Course

- Rate one finance section on the five-point scale and calibrate the ratings with its controller.
- Rank its weighted gap scores and present a priced development budget proposal.

Finance Team Skills Gap Matrix and Development Planning Questions FAQ

What is a finance team skills gap matrix, and why does it matter now?

A finance team skills gap matrix compares the proficiency each finance role needs with what staff currently show. It matters now because automation and business partnering are reshaping finance work while learning budgets stay tight.

Which roles gain most from finance team skills gap matrix and development planning?

Finance heads and finance training leads gain most, along with controllers who rate their own staff.

How does a finance team skills gap matrix course differ from a general competency framework course?

It applies skill assessment only to finance roles. A general competency framework course covers behaviours organisation-wide; this course scores accounting, systems, analysis and partnering gaps and prices the actions.

What do you bring back from finance team skills gap matrix and development planning training?

You bring back a finance team skills gap matrix with role profiles, calibrated ratings, weighted gap scores, prioritised development actions and a costed budget proposal.

Finance Team Skills Gap Matrix and Development Planning: The Way Forward

The finance team skills gap matrix first informs which shortfalls receive this year's development budget. Finance heads, controllers and human resources partners use it to agree training, hiring and succession choices. After its first assessment round, revisit the proficiency descriptors and risk weightings against how staff performed in the next close cycle.