

Accounting & Tax

# Leveraging Management Accounts & Information

## Course Details

**Price**

£225.00

**Start date**

8 June 2026

**Length**

Half day (09:00-13:00)

**CPD Points**

4.00

## Course Overview

This session is designed for high-performing professionals, managers, directors, and specialists, who want to sharpen their financial literacy in order to drive decisions, shape strategy and tell the story of performance.

Whether reviewing board packs, managing budgets, or simply wanting to ask better questions in meetings, these sessions will give delegates the clarity and confidence to engage with financial information.

The course focuses on management accounting and is designed for professionals who want to strengthen their ability to plan, forecast, and interpret financial data in a management or leadership context.

Whether preparing budgets, reviewing board reports, or working and leading through financial planning cycles, this session will give delegates the confidence to engage with the numbers and contribute meaningfully to financial conversations.

## Content

**Flexible learning that works for you**

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- Understand the purpose, structure, and process of budgeting and how to use budgets to drive accountability and performance.
- Practical Exercise: Budgeting workshop
- Learn how cash moves through a business, why it matters more than profit in many cases, and how to interpret operational cashflow statements.
- Explore how internal financial data supports decision-making, planning, and performance tracking (including forecasting techniques and variance analysis)
- Practical Exercise: Management accounting, cashflow and forecasting workshop
- Discover what boards and senior leaders expect from financial reports, how to interpret dashboards and KPIs, and how to tell a compelling financial story with data
- Practical Exercise: Management Information Workshop
- Use financial data to support resource allocation, performance reviews, and strategic planning

## Benefits

This course is designed to empower high-performing managers, directors, and specialists with the financial insight they need to lead confidently.

Upon completion, delegates will have:

- Understanding of the fundamentals of budgeting, forecasting, and cashflow management and how these tools support strategic decision-making and operational control
- More confidence in engaging with management information, interpreting dashboards, KPIs, and creating board-level reports with ease
- Practical Insight into Cashflow and Forecasting, understanding how cash moves through a business and why it matters more than profit in many case.
- The skills to use forecasting techniques to anticipate challenges and plan proactively
- Understanding of what boards expect from financial reporting and be able to provide them with reports that provide financial insights in a clear, commercial, and strategic way

## Prerequisites

This course is designed for Assistant Manager level and above.

## Next Steps

If you would like to book a place on this course please click on the **'Book Course'** button to the right of this page and login or register for a user account to complete your booking(s). Any queries please do not hesitate to contact us via [admin@gta.gg](mailto:admin@gta.gg) or call us on 01481 224570.

If no date is scheduled for this course at the present time please click on the **'Register Interest'** button and login or register for a user account so that we can add you to our course interest register. This register allows us to contact our tutors and finalise dates for a course as soon as we have a few people who have expressed their interest, so the more delegates who register their interest, the sooner we can schedule a particular course.

## Course Tutor

### Victoria Le Poidevin

Vicky Le Poidevin FCA, Dip IoD regularly provides interactive and engaging training sessions to a wide range of financial services and commercial delegates. Vicky continually adapts her training style to suit the variety of delegates that attend her courses, and she actively enjoys running training for all levels of experience including parties at the beginning of their career, directors looking to continually enhance their skills and all parties in between looking to upskill or get ahead in their career. Vicky's training is underpinned by practical, real-life examples that leverage her 20 plus years' experience in the financial services sector. Vicky believes that delegates learn by doing, so she tries to include practical exercises into her courses to ensure the learning experience remains interesting, relevant, and engaging. As well as running numerous training courses, Vicky is a management consultant and has worked with numerous businesses on multiple projects, giving her a unique knowledge and experience to enrich her training. Vicky's generalist financial services experience also includes 10 plus years of auditing and accounting with a big four firm /regional firm and holding senior roles in both the Fund and Trust sector.