

MANAGEMENT REPORTING FOR MANAGERS WORKSHOP

MANAGEMENT REPORTING TECHNIQUES
TO DEMONSTRATE YOUR ORGANISATION'S
PERFORMANCE & OPTIMISE COMMUNICATION

22 & 23
OCTOBER
CLIFTONS MELBOURNE

EXPLORE

- ▶ Determine key performance requirements of senior executives & operational managers in your organisation
- ▶ Develop an organisation-wide performance framework aligned with your strategic & operational objectives
- ▶ Map the flow of interdependent strategic & operational performance objectives
- ▶ Assess the value of performance metrics that will inform senior management about performance against strategic & operational objectives
- ▶ Identify the characteristics of value-adding analysis & evaluation
- ▶ Determine the structure of your management report
- ▶ Compare alternative approaches for displaying & communicating performance information
- ▶ Confidently & persuasively present a performance analysis report to decision makers
- ▶ Plan the implementation of improvements to your organisation's performance reporting

EXPERT FACILITATOR



Kevin Riley
Managing Director
Capital Training College

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ABOUT THE EVENT

Accurate, timely and coherent performance information is fundamental to the success of any organisation. The International Accounting Standards Board and Australian Accounting Standards Board have been active in promoting the importance of preparing less complex financial reports that focus on material disclosures and better meet the needs of users. ASIC have also publicly stated that it only focuses on those disclosures that are material to the financial report.

The principles of focusing on the decision-making needs of users and preparing less complex reports equally apply to the needs of internal management. Taking an integrated approach to management reporting also enhances the financial analysis to support internal management – by making the linkages to the strategic or operational imperatives of the organisation clear and explicit.

This unique workshop is designed to provide attendees with an opportunity to evaluate their organisation's performance reporting framework against alternatives. Delegates will develop a best fit framework to meet their organisation's strategy and performance reporting needs. The interactive workshop format will enable a combination of structured learning and peer-to-peer experience sharing. It will help you prepare and deliver a presentation targeted to a senior executive group and a documented performance report. You will also learn how to communicate a performance story effectively and confidently.

WHO WILL ATTEND?

- ▶ Operations Managers
- ▶ Group Managers
- ▶ Program Managers
- ▶ Finance / Financial Reporting
- ▶ Management Accounting
- ▶ Management Reporting
- ▶ Performance Management

22 OCTOBER DAY ONE

Develop a performance reporting framework for your business

- ▶ What is the purpose of a performance reporting framework?
- ▶ Taking a 'whole-of-entity' perspective to organisational performance
- ▶ What are your decision makers expecting to receive as a performance report?

Management decisions and how your reporting framework supports them

- ▶ Review approaches for a financial and performance reporting framework, including:
 - ▶ Outcome and output performance models
 - ▶ Kaplan and Norton's Balanced Scorecard
 - ▶ The Business model canvas
 - ▶ Broad-based business reporting, or 'Six Capitals' integrated reporting
- ▶ Assessing and 'stress-testing' the appropriateness of alternative framework models for your organisation
- ▶ Considering the reporting timeframes - aligning reporting to decision making cycle

Case Study will be used to highlight the key aspects of concern in developing 'whole-of-entity' performance frameworks

Mapping the performance interdependencies

- ▶ Determine the cause and effect linkages between performance objectives
- ▶ Applying Kaplan and Norton's strategy map and business model canvas mapping approaches
- ▶ Using the mapping to identify leading and lagging performance indicators and metrics
- ▶ Identify what content should be focused on in the performance report

Case Study: Apply the mapping concepts

What should the performance report look like?

- ▶ Identify the characteristics of your agency's preferences for performance reports
- ▶ How to move beyond the financials alone
- ▶ Consider other types of performance reports
- ▶ Dashboards, Scorecards
- ▶ Develop your preferred approach - what will meet your performance reporting requirements?

23 OCTOBER DAY TWO

Building a performance report - analysis and evaluation

- ▶ What does good analysis and evaluation look like?
- ▶ How can you add value through good analysis and evaluation?
- ▶ Build a performance report, applying the principles considered in earlier session
- ▶ A performance dashboard, a performance scorecard

Group discussion: Participants will be given individual feedback on the information they present

Dealing with data and information for performance reporting

- ▶ Dealing with data - volume, velocity, richness and integrity
- ▶ Understand the numbers - the critical math behind statistics, scale and percentages
- ▶ Visualisation - legibility colour, scale and context
- ▶ Fundamental tools for enabling analysis: Ratios, line charts, vertical bars, horizontal bars, pie charts, tables, pictograms, maps

Interactive session: Presenting on performance

- ▶ Develop and present a verbal presentation on a performance concept
- ▶ Think about your audience: what response do you want and what will be effective communication for them?
- ▶ Understand the impact of body language and confidence
- ▶ Preparing your presentation - what to cover, structure and presentation
- ▶ Storytelling to convey information to be remembered and acted upon
- ▶ Getting on top of your nerves

Planning the implementation of improvements to your performance report

- ▶ Determine where to start and how to get buy-in and engagement with executive and senior management
- ▶ Strategies for overcoming roadblocks and gaining take-up of improvements in performance reporting
- ▶ Build a performance culture that is about continuous performance improvement

Develop an 'Action Plan' to implement your enhanced management performance reporting approach

YOUR FACILITATOR

Kevin Riley has more than 30 years of experience in financial and performance management and budgeting. This includes working with Treasury and Finance departments in the Commonwealth and across all Territory and State jurisdictions. This includes assisting many agencies apply their jurisdiction's planning, budgeting and performance reporting frameworks.

Kevin and the Capital Training College team have more than 20 years of experience in designing and facilitating learning and development programs focused on building work teams' financial and risk management performance measurement and improvement skills and capabilities.

Kevin will draw upon his public sector experience to assist you to enhance your skills in strategic and operational planning, costing, budgeting and forecasting, analysis and evaluation and performance reporting. Kevin's experience also includes financial management consulting and assurance experience with PricewaterhouseCoopers (PwC) from 1983 to 1996. Kevin is a Fellow with both Chartered Accounts Australia and New Zealand and CPA Australia. He is also a Qualified Accountant with the Chartered Institute of Public Finance and Accountancy (UK).

Kevin is the National Treasurer and National Councilor for the Institute of Public Administration Australia.



Kevin Riley
Managing Director
Capital Training College

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