first intuition*

where people count

First Intuition East Anglia Digital Finance Programme

Courses in Digital and Data in Finance

"Information is the oil of the 21st century, and analytics is the combustion engine."
Peter Sondergaard

WHAT   Our Digital & Data Programme

First Intuition has designed and developed 'finance-flavoured' programmes to help accounting and finance professionals gain a better understanding of digital technologies: how they are relevant to the finance world and how they can help provide insight and impactful support for business decision-making.

Our immersive courses deliver the key topics in an interactive session led by our digital finance experts. The courses, whilst delivering the key messages and key facts/approaches, give the opportunity to undertake workshop-based case studies and activities to apply learning to real-world examples and individuals' own roles and organisations, both individually and in groups. Value is created in a shared learning experience which includes goal setting and opportunity for reflection on current and future practices.

Digital Programme Manager, and creator of our courses, Louisa Matheson comments:
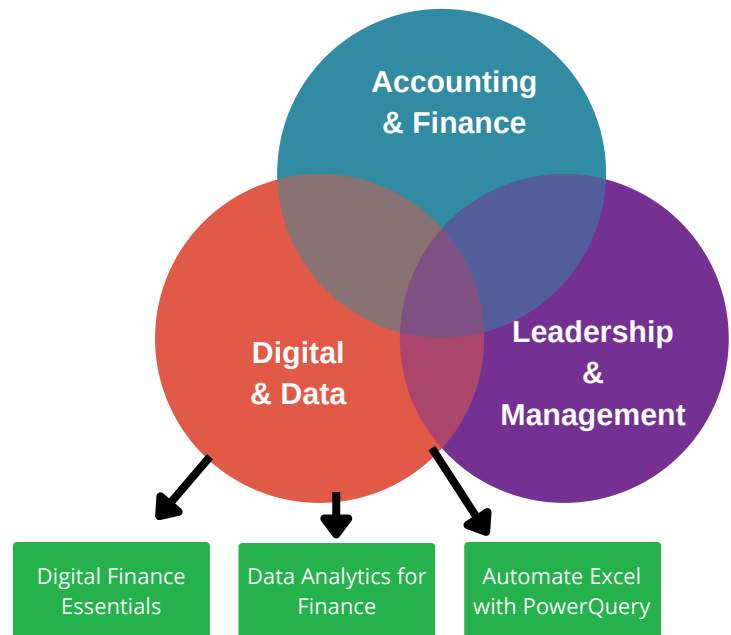
"I'm really excited about our digital courses because they combine the opportunity to:

- Strip away the hype and jargon and discuss the latest developments and opportunities in Digital Finance and Data Analytics, and
- Focus on people and how we can overcome resistance to change and develop a growth mindset.

I'm pleased to be able to help people take away practical ideas to implement in order to add value and increase efficiencies in their business. The classroom discussions and opportunity to reflect and share tips and ideas works really well."

Accounting & Finance

Digital & Data

Leadership & Management

| Digital Finance Essentials | Data Analytics for Finance | Automate Excel with PowerQuery |

We also offer bespoke courses for Leaders in Digital and Data in Finance.

For further information please contact louisamatheson@fi.co.uk OR timhowes@fi.co.uk

> **What I will be doing in even 5 years will be very different to today. It's important that finance professionals embrace this change now. We need to swim with the tide, not against it.**
>
> **Becky Glover**
> **FD VNC Automotive**

Automate Excel with PowerQuery

This programme provides the core Excel skills for finance professionals to manage information, convert information into data and build reports and dashboards which can be updated through automation.

The Excel features covered include Tables, Power Query and Charts, this is combined with best practices in data structures, naming conventions and visualization to provide an optimal blueprint for all reporting.

This one day course covers:
- How to understand the stages of building dynamic automated reports from information
- To be able to identify the optimal tools available for each stage in the report building process
- To be confident in using Excel's Table feature for holding and managing data
- To understand the key Table features and their role in automation
- To be able to identify optimal data structures for working in Excel
- To understand best practices in file naming convention for automating data refresh procedures
- How to connect to a variety of sources and reshape into optimal data structures
- To create parameters to dynamically repoint to new sources
- To structure an Excel workbook to segregate data, calculation and reporting
- To build dynamic automated dashboards for business intelligence and insight

"I think the course is for everyone, as the change and advancements are coming and we all need to embrace them to stay relevant."

Digital Finance Essentials

This programme will help to create a level of essential knowledge and understanding of digital finance trends and the technologies enabling the shift, including:

- An understanding of the changes we can make from digital transformation through to marginal gains, including an insight into:
  - Automation
  - Data analytics and data visualisation
  - Machine learning and artificial intelligence
  - Blockchain and cryptocurrency
- The skills and roles required to undergo digital transformation
- The possible barriers and pain points and thus the mindset shift required for digital transformation
- The organisation culture and growth mindset required for successful change and implementation of digital technologies
- Ethical considerations and digital risk management

Data Analytics for Finance

This programme will enable you to understand how data analytics can transform an organisation and the services it offers and well as how you can enhance your data translation skills, including:

- An understanding of data, big data and data analytics
- The four levels of data analytics (Describe, Diagnose, Predict and Prescribe)
- How statistical tools can help us to identify patterns and outliers
- How we can visualise the data and tell the story
- Explore tools and technology for data analytics and data visualisation
- The challenges such as data quality, data bias and ethical issues
- Data Analytics framework
- Skills and roles in Data Analytics

"The course really opened my eyes into how much the business world is changing in terms of its requirements from Finance."

WHO Who is the programme for?

This programme is for accounting and finance professionals at any stage in their career journey looking to build their awareness of the digital technologies which are relevant to the finance world, and the impact they are having on the business environment.

This programme will help staff to develop a common frame of reference and terminology for improving their internal planning of how to adopt digital finance technologies with most impact. These new courses offer an opportunity for professionals to increase their knowledge, develop broader technology skills, and understand how technology can create value for their organisations. They are suited for:

- With an interest in digital and data analytics and keen to learn more, or
- Where digital and data analytics are becoming relevant for their role and they need to develop their skill set, or
- Who lead or manage staff who use digital and data analytics.

WHY Why Digital Finance Training?

A shift in the technological landscape means finance professionals are required to adapt their skillset to support the changes happening internally in day-to-day activities and externally in the business environment.

Digital skills are the skills needed to use and utilise digital devices, applications, programmes, and systems in order to share information and work efficiently in the evolving industry. Data skills include the collection of data, pattern identification, visualisation, protection of data, and data analytics. For those working in a finance role, there is a real opportunity to lead organisations to better business decisions driven by new insights rather than simply reporting on past events.

As finance professionals working in a business to support other functions, teams and clients, what can these digital and data skills enable:

- A connection between people with disparate skills and roles
- Support the bridging of technological, knowledge, and communication gaps
- Create relations with data and systems between roles, workers, teams, and domains
- Inform R&D or clients with consumer, marketplace, and business insight
- Apply the creative power of digital science to the overall business enterprise/clients business
- Unlock, add, and communicate the value of digital technologies available to adopt in attendees' businesses

Course dates and prices

We have open public courses available for booking individual or small cohorts on to or we can offer bespoke delivery for your internal cohorts at your premises, online live or at our First Intuition centre. To find specific course dates please click here or email louisamatheson@fi.co.uk for further information.

Digital Finance Essentials
Public online live course:
£450 (excl VAT) per delegate

Data Analytics for Finance
Public online live course:
£850 (excl VAT) per delegate

Automate Excel with PowerQuery
Public online live course:
£400 (excl VAT) per delegate

Bespoke courses – For between 10 - 25 delegates we can deliver a programme with activities to suit the experiences and knowledge of your team. Price on application.

For further information please contact
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"I feel this has really inspired me to think more out of the box in terms of presenting information – adding charts etc to the information that previously has been predominantly data."