MAGNA SKILLS DEVELOPMENT INSTITUTE

Capacity Building • Professional Training • Organisational Development

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Course Profile Document

Supervisors and Managers

Budgets and Financial Reports

Prepared as a professional course profile for delegate review, sponsorship approval and organisational training planning.

COURSE CODE	DELIVERY	DURATION	PREPARED FOR
MSD2939	**Online / Face-to-Face**	**Flexible**	**Organisation Approval**

Register for this Course **View Online Course Page**

Course Overview

The goal of this workshop is to give the participant a basic understanding of budgets and financial reports so they can hold relevant discussions and render decisions based on financial data. This course will define key terms like ROI, EBIT, GAAP, and extrapolation. Furthermore, this one-day course will discuss commonly used financial terms, financial statements, budgets, forecasting, purchasing decisions, and laws that regulate the handling of financial information. Before we begin, let us get to know more about each other.

Everyday businesses deal with budgets and financial reports in some form or fashion. At minimum, business managers review budget numbers and run financial reports for decision-making and reporting to shareholders and Federal regulators once a month. Many companies devote the last few months of the calendar year to creating budgets for the next calendar year. In addition, organizations create and disseminate year-end financial reports to investors.

Course Outcomes

Research has consistently demonstrated that when clear goals are associated with learning, it occurs more easily and rapidly.

In this course, participants are going to achieve the following learning objectives:

- Identify financial terminology
- Understand financial statements
- Identify how to analyze financial statements
- Understand budgets
- How to make budgeting easy
- Understand advanced forecasting techniques
- Understand how to manage the budget
- Identify How to make smart purchasing decisions
- Identify the legal aspects of finances

Course Outline / Curriculum

Module One: Getting Started

- Workshop Objectives

Module Two: Glossary

- What is Finance?
- Commonly Used Terms
- Key Players
- Important Financial Organizations
- Understanding GAAP
- Case Study
- Module Two: Review Questions

Module Three: Understanding Financial Statements

- Balance Sheets
- Income Statements (AKA Profit & Loss Statements)
- Statement of Retained Earnings
- Statement of Cash Flows
- Annual Reports
- Case Study
- Module Three: Review Questions

Module Four: Analyzing Financial Statements (I)

- Income Ratios
- Profitability Ratios
- Liquidity Ratios
- Working Capital Ratios
- Bankruptcy Ratios
- Case Study 26Module Four: Review Questions

Module Five: Analyzing Financial Statements (II)

- Long-Term Analysis Ratios
- Coverage Ratios
- Leverage Ratios
- Calculating Return on Investment (ROI)
- Case Study
- Module Five: Review Questions

Module Six: Understanding Budgets

- Common Types of Budgets
- What Information do I Need?
- Who Should Be Involved?
- What Should a Budget Look Like?
- Case Study
- Module Six: Review Questions

Module Seven: Budgeting Made Easy

- Factoring in Historical Data
- Gathering Related Information
- Adjusting for Special Circumstances
- Putting It All Together
- Computer Based Methods
- Case Study

Module Seven: Review Questions

- Module Eight: Advanced Forecasting Techniques
- Using the Average
- Regression Analysis
- Extrapolation
- Formal Financial Models
- Case Study
- Module Eight: Review Questions

Module Nine: Managing the Budget

- How to Tell If You’re on Track
- Should Your Budget be Updated
- Keeping a Diary of Lessons Learned
- When to Panic
- Case Study
- Module Nine: Review Questions

Module Ten: Making Smart Purchasing Decisions

- 10 Questions You Must Ask
- Determining the Payback Period
- Deciding Whether to Lease or Buy
-

Thinking Outside the Box

- Case Study
- Module Ten: Review Questions

Module Eleven: A Glimpse into the Legal World

- A Brief History
- The Sarbanes-Oxley Act
- CEO/CFO Certification
- 8th Company Law Directive
- Case Study
- Module Eleven: Review Questions

Module Twelve: Wrapping Up

- Words from the Wise

Target Audience

Key Course Benefits

Work-Ready Skills

Delegates leave with practical tools, templates and methods they can apply immediately at work.

Better Institutional Results

The programme supports stronger planning, reporting, compliance, accountability and service delivery.

Sponsor-Friendly

This document is designed to help supervisors, HR units and sponsors approve delegate participation quickly.

Professional Recognition

Delegates receive training documentation and a certificate of completion after successful participation.

Our Training Centres & Delivery Options

Magna Skills offers flexible delivery through face-to-face training centres across Africa and beyond, plus Online / E-Learning for delegates who prefer remote participation.

Southern Africa

Practical training destinations with strong travel access and delegate support.

- Pretoria, South Africa
- Vic Falls, Zimbabwe
- Livingstone, Zambia

East Africa

Popular regional centres for government, NGO and donor-funded project teams.

- Kigali, Rwanda
- Kampala, Uganda
- Nairobi,
- Zanzibar, Tanzania

West Africa & Islands

Strategic locations for regional networking and executive capacity building.

- Accra, Ghana
- Port Louis, Mauritius

International Executive Venue

Premium destination training for senior teams and international delegates.

- Dubai, United Arab Emirates

Online / E-Learning

Attend from anywhere through live online, blended or self-paced learning options.

- Online, E-Learning
- Remote Teams
- Flexib

Organisation-Based Training

Magna Skills can also arrange dedicated in-house training for ministries, NGOs and companies.

- Onsite
- Custom Dates
- Group Training

Ready to Nominate Delegates?

Use the links below to register, review the live course page or contact Magna Skills for organisation-based training support.

Register / Apply Online | **View Full Course Page**

About Magna Skills

Magna Skills Development Institute provides practical capacity building programmes for government departments, NGOs, public institutions, donor-funded projects and private sector professionals across Africa. Our training approach combines expert facilitation, real workplace case studies, practical tools, post-training support and professional documentation that helps organisations strengthen staff performance and service delivery.

Government Training | NGO Capacity Building | Corporate Workshops | Online Learning | Face-to-Face Training | Certifica

Approval & Authorisation Form

This section may be completed by the organisation, department, HR office, finance office or sponsor approving delegate participation. It can be attached to an internal memo, procurement request or training approval submission.

Organisation / Department	
Delegate Name(s)	
Approved Course	Budgets and Financial Reports
Preferred Delivery Mode	☐ Online ☐ Face-to-Face ☐ Organisation-Based Training
Preferred Training Venue / Date	
Estimated Number of Delegates	
Budget / Vote Number	
Contact Person	
Email / Mobile	

Authorised Name _____ Signature / Stamp _____ Date _____