



One Day Program

Financial Measurements Essentials

Thursday, July 20, 2023

Agenda

Eastern Time	Segment
10:45-11:00 AM	Meet and Greet with your instructor
11:00-12:40 AM	Session 1 – Storytelling with Financial Data
11:40-12:00 PM	Defining your Role, Identifying the Best Metrics, Non-Financial KPI's
12:00-12:40 PM	Understanding your Client, Laying the Groundwork, Ask the Right Questions
12:40-1:00 PM	Break
1:00-1:40 PM	Session 2 – Building to the Ideal Relationship
1:40-2:00 PM	Connect to Reach Reporting, Connect the Data, Generate 1 st Report
2:00-2:40 PM	Individual Work
2:40-3:00 PM	Break
3:00-3:40 PM	Session 3 – Perfect the Deliverable
3:40-4:00 PM	Scaling your Service, Clients, and Firm
4:00-4.40 PM	Optimize the Reporting Process
4:40-5.00 PM	Wrap up and Questions