

MANAGEMENT, REPORTS AND ANALYSIS



GENTEX[®]
TRAINING CENTER



Introduction

Managers decide on the strength of the reports in front of them, and weak reporting hides problems until they are expensive. The Management, Reports and Analysis Training Course teaches professionals how to produce reporting that supports real decisions. Participants learn to define measures, collect reliable data, analyse performance, and present findings clearly to management. Furthermore, the programme covers variance analysis, forecasting, dashboards, and reporting cycles. Delivered by Gentex Training Center over five days, this programme suits managers, analysts, and reporting officers. As a result, participants brief decision makers with accurate, relevant, and well-structured information.

Management, Reports and Analysis Course Objectives

- Explain the purpose, types, and audiences of management reporting.
- Design indicators using SMART criteria and the balanced scorecard framework.
- Apply the KPI hierarchy from strategic objectives to operational measures.
- Collect, validate, and clean data for accurate management reporting.
- Apply variance analysis using price, volume, mix, and rate decomposition.
- Use trend analysis, forecasting, and simple modelling techniques.
- Build dashboards and visual reports with Excel and Power BI.
- Apply the BLUF principle and the pyramid principle to report structure.
- Write executive summaries, findings, and recommendations clearly.
- Establish reporting cycles, owners, and governance discipline.

Course Methodology

- Practical workshops producing real management reports and dashboards.
- Data analysis labs using spreadsheets and reporting tools.
- Reporting clinics with peer review and rewriting exercises.

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- Case studies of strong and weak management reporting.
- Presentation practice with recorded feedback on report briefings.
- Action planning that improves a current reporting process.

Who Should Take This Course

- Department and functional managers preparing management reports.
- Analysts, planners, and performance officers.
- Finance and operations staff producing periodic reporting.
- Project and programme reporting officers.
- Business intelligence and data analysts.
- Administration and executive support staff compiling reports.
- Professionals responsible for KPI design and monitoring.

Management, Reports and Analysis Course Outlines

Day 1: Reporting Foundations and Requirements

- Purpose of management reporting and its link to decision making.
- Reporting types: operational, financial, project, and strategic.
- Audience analysis: what each decision level actually needs.
- Reporting cycles, cadence, and governance ownership.
- Data sources, definitions, and single source of truth.
- Common reporting failures and their business cost.
- Self-assessment: current reporting quality and gaps.

Day 2: Designing Indicators and KPIs



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- SMART criteria applied to indicator design.
- The balanced scorecard: financial, customer, process, learning.
- KPI hierarchy: strategic, tactical, and operational measures.
- Leading and lagging indicators explained.
- Targets, baselines, and thresholds.
- Avoiding vanity metrics and measurement distortion.
- Workshop: building a KPI set for a real function.

Day 3: Data Collection, Validation, and Analysis

- Data collection methods and quality controls.
- Validating, cleaning, and reconciling data sets.
- Variance analysis: price, volume, mix, and rate.
- Trend analysis, moving averages, and seasonality.
- Forecasting methods and assumption documentation.
- Root cause analysis of performance deviation.
- Lab: analysing a performance data set.

Day 4: Reporting Design and Visualisation

- The BLUF principle and the pyramid principle for reports.
- Writing executive summaries within strict word limits.
- Chart selection: comparison, trend, composition, and distribution.
- Dashboards in Excel and Power BI: layout and interaction.
- Tables, annotations, and reconciliation discipline.
- Avoiding misleading visuals and distorted scales.
- Clinic: rebuilding a weak report into a clear one.





Day 5: Briefing, Review, and Action Planning

- Presenting reports to management and committees.
- Handling questions and challenge on numbers.
- Reporting exception and escalation discipline.
- Documenting assumptions, limitations, and data sources.
- Reviewing reporting effectiveness with feedback loops.
- Building a 90-day reporting improvement plan.
- Final presentations, peer review, and course consolidation.

Conclusion

By successfully completing the Management, Reports and Analysis Training Course, participants will have acquired practical knowledge of indicator design, the balanced scorecard, data validation, variance and trend analysis, forecasting, dashboard design, and structured report writing. In addition, they will brief management with accurate and decision-ready information. Gentex Training Center delivers this programme through live reporting workshops and data labs, so participants apply their new knowledge immediately.

FAQs

Q1 What is the "Management, Reports and Analysis" course about?

The course teaches professionals how to produce reporting that supports management decisions. It covers indicator design, data collection and validation, variance and trend analysis, forecasting, dashboard building, and structured report writing and briefing.



Q2 What are the key benefits of the "Management, Reports and Analysis" course?

Participants produce reports that decision makers read and act on, and they surface problems earlier. Furthermore, they reduce time spent compiling figures, align measures with strategy, and defend their analysis under challenge. As a result, management decisions become faster and better informed.

Q3 What skills will I gain from the "Management, Reports and Analysis" course?

Participants gain indicator and KPI design, data collection and analysis, report design and dashboard visualisation, and management briefing and reporting governance. These four skills combine to raise the quality and credibility of organisational reporting.

Q4 What tools, methods, or standards are covered in the "Management, Reports and Analysis" course?

The programme uses SMART indicator criteria, the balanced scorecard framework, KPI hierarchies, leading and lagging indicator analysis, variance decomposition by price, volume, mix and rate, trend and moving average analysis, forecasting methods, the BLUF and pyramid principles, Excel and Power BI dashboards, and exception and escalation reporting formats.



Q5 How is the "Management, Reports and Analysis" course applied in real-world practice?

Professionals apply it when preparing monthly performance packs, reporting budget variance, building KPI dashboards for leadership, tracking project progress, presenting operational reviews, and explaining performance shortfalls to committees. In addition, they use it to redesign reporting processes that consume too much staff time.