

SEHG IN-PERSON WORKSHOP SERIES

Budgets and Financial Reports

Instructor-Led Workshop · Facilitator Kit

Complete facilitator kit for delivering the SEHG Budgets and Financial Reports workshop on site — training manual, instructor guide, slides, icebreakers, quick-reference sheets, and completion certificates.

WHAT'S IN THIS KIT

01 · Training Manual (participant workbook)

02 · Instructor Guide (facilitator script & timings)

03 · Icebreakers & Activities

04 · Presentation Slides

05 · Quick Reference Sheets (takeaway)

06 · Certificate of Completion

SEHG-SV-1144 · IN-PERSON WORKSHOP KIT

synergyeducationholdings.com

Budgets and Financial Reports

SYNERGY EDUCATION HOLDINGS GROUP · IN-PERSON WORKSHOP SERIES

About This Workshop

Money matters can be intimidating for even the smartest people. However, having a solid understanding of basic financial terms and methods is crucial to your career. When terms like ROI, EBIT, GAAP, and extrapolation join the conversation, you'll want to know what people are talking about, and you'll want to be able to participate in the discussion.

The Budgets And Financial Reports workshop will give you a solid foundation in finance. We'll cover topics like commonly used terms, financial statements, budgets, forecasting, purchasing decisions, and financial legislation.

Workshop 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

Format & Delivery

- Instructor-led session, delivered on site or SEHG-hosted
- Includes participant workbooks, activities, and takeaway reference sheets
- Every participant receives an SEHG Certificate of Completion
- Pairs with the SEHG online Budgets and Financial Reports course for pre-work and reinforcement

Preparing & Delivering the Workshop

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Before the Workshop

- Review the Instructor Guide end to end — timings, scripts, and activity setup
- Print one Training Manual and one Quick Reference Sheet per participant
- Load the Presentation Slides and test the projector, audio, and clicker
- Choose 1–2 icebreakers from the kit that fit the group size and room
- Prepare blank Certificates of Completion for sign-off at close

Checking Out the Venue

- Adequate seating with clear sight lines to the facilitator and screen
- Projector compatibility, cables, and extension cords tested in advance
- Lighting that lets participants see you, their notes, and the screen
- Space for group activities, plus a table for handouts and materials

Closing the Session

- Recap the workshop objectives and each participant's key takeaway
- Distribute the Quick Reference Sheet as the on-the-job takeaway
- Present the SEHG Certificate of Completion to each participant
- Point participants at the paired SEHG online course for reinforcement

Book this workshop

Contact your SEHG program advisor to schedule this workshop for your team, or add it to any SEHG learning program as the in-person option.

SYNERGY EDUCATION HOLDINGS GROUP

Certificate of Completion

This certificate is proudly presented to

for successfully completing the SEHG in-person workshop

Budgets and Financial Reports

Awarded this ____ day of _____, 20__

Facilitator Name & Title



Synergy Education Holdings Group