

Finance Fundamentals for Non-Finance Professionals

Understand the Numbers, Speak the Language, Drive Better Decisions

About the Training Course

In today's results-driven workplace, understanding finance is no longer optional. It is foundational. This training is designed for forward-thinking professionals who want to read, interpret, and use financial reports, such as monthly management accounts, to contribute confidently to business decisions.

If you are not financially literate, you risk being left out of key conversations that shape your department and your career.

This program does not just explain finance. It shows you how to use it through real-life examples, practical exercises, and hands-on data visualization using BI tools. You will walk away with skills you can apply immediately to drive performance and influence decision making.

Finance is the language of business — speak it with confidence.

Course Details

Duration

1 Day (18 December 2025)



Maximum Participants

25 pax



Practical Real-world Applications



Training Mode

Interactive Workshop

Methodology



Lecture



Hands-on Learning



Group Discussions / Exercises



Interactive Workshops

Learning Outcomes



Understand core finance concepts and principles



Read P&L, Balance Sheet, and Cash Flow



Interpret monthly management accounts & variances



Build and monitor budgets; analyze costs & profitability



Visualize financial KPIs with BI dashboards



Communicate confidently with finance teams

8-Module Comprehensive Curriculum

Structured Learning for Maximum Impact

1 Finance Essentials for Non-Finance Professionals

Finance Isn't Just for the Finance Team.

- Why finance matters
- Finance basics & key principles
- Link numbers to business strategy

2 Mastering the P&L Statement

Understand the P&L, Empower Your Decisions.

- Revenue, costs & expenses
- Gross profits vs EBITDA vs Profit before tax vs Net profit
- Common pitfalls and red flags

3 Understanding the Balance Sheet

No More Intimidation — Just Clear Insights.

- Assets, liabilities, and equity
- How the Balance Sheet connects with P&L
- What the numbers reveal about the financial position

4 Why Cash is King

Master Cash Flow — The Lifeline of Any Business.

- Operating, investing, financing flows
- Managing liquidity and working capital

5 Reading & Interpreting Financial Reports

Decode the Reports That Drive Your Business.

- How to read monthly management accounts
- Variance analysis: actual vs budgeted
- Spot trends and hidden risks

6 Budgets, Forecasts & Cost Management

Plan Smart. Spend Right. Grow Strong.

- How to prepare and manage budgets
- Break-even analysis
- Cost management strategies

7 Data Visualization & BI Reporting

Make Your Data Speak — Visually and Powerfully.

- Turn data into actionable visuals
- Use dashboards to communicate results clearly
- Practical BI tips for non-finance teams

8 Key Takeaways and Summary

Big Ideas. Simple Summary

- Reinforce key concepts
- Tips for collaborating with finance teams

Target Audience

- Managers & Supervisors
- Departmental Managers & Team Leads
- Non-finance Executives & Professionals
- Entrepreneurs, Business Owners and C levels
- Operations Executives & Managers
- Department Heads
- Anyone who wants to be financially confident

Key Benefits

- Understand core finance concepts in plain language
- Read and interpret key financial reports with confidence
- Master P&L, Balance Sheet & Cash Flow fundamentals
- Create, manage, and monitor budgets
- Analyze costs and profitability
- Visualize financial KPIs using BI dashboards
- Communicate with confidence with finance teams
- Make smarter business decisions backed by numbers
- Boost your business acumen and career credibility

One-Day Training Itinerary

Date: 18 Dec 2025

Time: 8:45 AM – 5:30 PM

Mode: Interactive Workshop

Day Schedule

Finance Fundamentals for Non-Finance Professionals

	Registration & Welcome Check-in, welcome, and networking	8:45–9:00
	Ice Breaker & Training Objectives Introductions and expectations	9:00–9:30
	Module 1: Finance Essentials Why it matters; core concepts	9:30–10:00
	Module 2: P&L Mastery Read, interpret, analyze P&L	10:00–11:00
	<i>Morning Tea Break</i>	11:00–11:15
	Module 3: Balance Sheet Basics Assets, liabilities, equity	11:15–12:15
	Module 4: Cash Flow Statement Money in/out; working capital	12:15–1:00
	<i>Lunch Break</i>	1:00–2:00
	Module 5: Reading Financial Reports Mgmt accounts & variance	2:00–3:00
	Module 6: Budgets & Cost Management Build and manage budgets	3:00–4:00
	<i>Afternoon Tea Break</i>	4:00–4:15
	Module 7: Data Visualization & BI Reporting Dashboards & visuals	4:15–5:00
	Module 8: Key Takeaways & Summary Reinforce concepts; tips	5:00–5:30
	Course Completion (5:30 PM) Wrap-up, certificate presentation, networking	

Important Notes

- Please arrive 15 minutes early for registration to ensure the training course can begin on time.
- All learning materials will be provided during the training course and additional reference resources will be shared after the training course.

Meet the Facilitator

Learn from industry expert with extensive experience in finance, data, and business operations

Ts. Au Soon Yong

HRDC Certified Trainer • Chartered Accountant • Professional Technologist (Ts.)

Ts. Au Soon Yong has over 20 years of experience as a chartered accountant, Group CFO of listed companies, Big 4 Executive Director, and Group COO managing complex financial operations across multiple sectors. He simplifies finance for non-finance professionals with a clear, practical, real-life approach that sticks.

He has served as the Group COO of a leading F&B retail group with over 150 outlets, overseeing end-to-end operations, finance, supply chain, technology, corporate strategy, and business planning across multiple brands. Previously, he was the Group CFO of a listed company in both Malaysia and Singapore, and held the position of Executive Director at an international Big 4 accounting and consultancy firm, leading data-driven transformation and finance initiatives across diverse industries.

As a qualified chartered accountant with extensive, hands-on experience in accounting and finance, he has strengthened financial processes, management reporting, and controls across multiple businesses. He leverages data and analytics to help organizations make clearer, smarter decisions and ensure that finance functions add real strategic value.

He also serves as an Industry Advisory Panel (IAP) member for several universities, contributing to curriculum development in digital finance, business, and technology. With global exposure spanning the UK, US, China, and Southeast Asia, Soon Yong is well-equipped to train professionals and organizations in financial management, process optimization, operational leadership, and technology-led transformation.





Professional Experience

-  Group COO & Executive Board Member (F&B retail, 150+ outlets)
-  Head of Digital Lighthouse at KPMG Malaysia
-  Head of Audit Department at KPMG Malaysia
-  Group CFO of a listed company

Credentials & Certifications

-  Chartered Accountant (MIA), FCCA, ASEAN CPA, CFE
-  Professional Technologist (Ts.) under MBOT
-  Microsoft Certified Solution Expert (Data Management & Analytics)
-  HRDC Certified Corporate Trainer
-  Certified Data Science Specialist (CDSS)

Trainer's Areas of Expertise

- | | |
|---|---|
|  Financial Statement Analysis |  Management Accounting & Reporting |
|  Budgeting & Forecasting |  Cash Flow Management |
|  Cost Management & Control |  Financial Data Visualization & BI |






About LEVELUP PRO ACADEMY

LEVELUP PRO ACADEMY






LEVELUP PRO ACADEMY is a leading provider of professional training and upskilling solutions, committed to empowering individuals and organizations with future-ready capabilities in AI, data analytics, digital transformation, leadership, and finance.

Our programs are designed and delivered by industry practitioners with real-world experience, ensuring practical insights and immediate application. Whether you are elevating your team's performance or future-proofing your career, LEVELUP PRO ACADEMY is your trusted partner in continuous learning and professional growth.

Why Choose Us

-  Industry-leading practitioners as trainers
-  Real-world, practical training approaches
-  HRDC-approved training programs
-  Customizable corporate training solutions
-  Continuous learning support

Our Commitment

-  Future-ready skill development
-  Immediate practical application
-  Personalized learning experiences
-  Long-term professional relationships
-  Measurable learning outcomes

Learn with LEVELUP PRO ACADEMY

Join organizations and professionals who trust LEVELUP PRO ACADEMY for learning and development. Whether you are an individual seeking advancement or a company upskilling your team, we are here to support your journey.

500+

Professionals Trained

200+

Training Hours

95%

Satisfaction Rate

Sign Up Today

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Training Fees & Registration

Regular Rate

RM1,450

Per participant

Early Bird

RM1,200 Save RM250

Per participant

Group Rate (Min. 4 Pax)

RM1,050 Save RM400

Per participant

100% HRDC Claimable (SBL-Khas / SBL)

Companies registered with HRD Corp can claim training costs for this program under the SBL-Khas / SBL scheme.

Registration Form (please complete for confirmation)

 **Training Venue**
Menara Biomed, 13, Jalan Cempaka SD 12/5, Bandar Sri Damansara, 52200 Kuala Lumpur

 **Training Date & Time**
18 December 2025

Fee Selection

☐ Regular Rate **RM1,450** ☐ Early Bird **RM1,200** ☐ Group Rate **RM1,050**

Company Name (if applicable)

Number of Participants

Contact Name

Phone

Email

Authorization

Name

Position

Company Stamp

Registration Steps

HRDC Registration

- 1 Complete course confirmation form
- 2 Receive confirmation and HRDC details
- 3 Apply for HRDC grant in e-TRiS
- 4 Provide proof of grant submission to secure seats

Non-HRDC Registration

- 1 Complete course confirmation form
- 2 Receive confirmation and payment details
- 3 Remit payment to LEVELUP PRO ACADEMY
- 4 Receive course materials during the training