# T Level Industry Placement SMALL TEAM Project Brief

## Financial performance review and budgeting toolkit

### Employer brief

**Project title:** Financial performance review and budgeting toolkit

**Organisation:** LedgerLine Consulting Ltd

**Placement contact:** Frank Ellis, Finance Manager

**Sector:** Accounting – Assistant Accountant

**Placement format:** Small team project (3–5 students, up to 105 hours, approx. 2–3 weeks)

### Project context

Our organisation seeks external insight into recent financial performance and wants to improve budget planning for the next year. We need a small team of T Level Accounting students to analyse existing financial data, identify trends, and help develop a simple budgeting toolkit for internal use.

We are seeking a small team of T Level students to work directly to our Finance Manager on this project. The students will be based at an agreed provider location and will be supervised and supported directly by Frank Ellis, including regular face-to-face engagement where possible. We will provide clear tasks, guidance and check-ins, and conduct formal reviews during the placement.

### Project objectives

* Analyse past financial statements and key performance indicators
* Interpret findings and identify trends (e.g., income, expenditure, ratios)
* Develop a user-friendly budgeting template or guidance tool
* Present findings and toolkit recommendations clearly

### Team tasks and activities

Overseen by Frank Ellis the team will:

1. Review last year's P&L, balance sheet, cash flow
2. Learn or refresh ratio analysis fundamentals
3. Calculate key ratios (e.g., gross profit margin, inventory turnover)
4. Analyse trends and produce a visual summary (charts/graphs)
5. Create a budgeting toolkit (Excel template with instructions)
6. Present the toolkit and insights to the Finance Manager

### Expected outputs

* Spreadsheet with calculated ratios
* Visual summary of financial analysis
* Budgeting template with user guide
* Final presentation (slides or report)

### Employer support

* The Finance Manager will make clear how much time will be spent working face-to-face with the student team and how to be contacted for clarification and feedback outside of this.
* Students will manage their day-to-day schedule but will receive regular and focused support and intervention from the Finance Manager.
* Where possible, the Finance Manager will co-locate with students for all or a significant portion of the project.
* Supply anonymised financial data and attend a midpoint review meeting.
* Provide final and formal feedback on the budgeting toolkit and student engagement

## Provider brief

### Overview

Working with the Finance Manager, this small team project gives students a real-world opportunity to apply accounting fundamentals. They will analyse financial data, interpret performance metrics, and create a useful budgeting tool—all while developing teamwork, communication, and client engagement skills.

### Mapped performance outcomes (Accounting Assistant specialism)

* PO1 – Produce and analyse a trial balance and financial statements
* PO2 – Prepare financial statements and interpret KPIs
* PO3 – Analyse business performance and present results
* PO4 – Provide support to tax and audit functions (e.g., identify compliance issues)
* PO5 – Prepare computations for payroll (if applicable)

### Employer suggested project timeline (3 weeks)

* Week 1: Project briefing, data familiarisation, ratio calculation training
* Week 2: Trend analysis, visualisation development, toolkit drafting
* Week 3: Toolkit finalisation, report and slide prep, presentation rehearsal

### Provider responsibilities

* Support with financial software or Excel guidance
* Ensure clear communication and presentation skills
* Coordinate with the employer to ensure consistent student supervision, clear contact channels, and timely feedback
* Provide a student team working area/facilities