Business Intelligence for MFIs: Dashboard Design Training Course

Professional Development Training Course Outline

Category	Microfinance & Financial Inclusion	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Business Intelligence for MFIs: Dashboard Design Training Course equips microfinance professionals with the expertise to harness data analytics, visualization, and reporting tools to drive strategic decisions. Participants will gain practical skills in designing interactive dashboards that enhance operational efficiency, portfolio performance, and client insights. Emphasis is placed on leveraging business intelligence (BI) technologies to monitor key performance indicators (KPIs), detect trends, and support data-driven decision-making in microfinance institutions (MFIs).

Through hands-on exercises, case studies, and real-world simulations, participants will learn to convert raw microfinance data into actionable insights. The course emphasizes dashboard best practices, data integration, visualization principles, and performance measurement, enabling MFIs to strengthen risk management, optimize loan portfolios, and improve overall financial performance.

Programme Curriculum

Business Intelligence for MFIs: Dashboard Design Training Course

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Course Objectives

1. Understand the fundamentals of business intelligence in microfinance operations.
2. Develop skills in data visualization and interactive dashboard design.
3. Apply trending BI tools and software for microfinance data analysis.
4. Identify key performance indicators and metrics for MFIs.
5. Integrate multiple microfinance data sources for holistic reporting.
6. Design dashboards for operational, tactical, and strategic insights.
7. Implement predictive analytics to forecast portfolio trends.
8. Enhance decision-making through real-time data monitoring.
9. Apply best practices in dashboard usability and data storytelling.
10. Ensure data integrity, quality, and governance in BI systems.
11. Optimize dashboards for loan portfolio management and client insights.
12. Align BI reporting with regulatory and compliance standards.
13. Create a roadmap for implementing BI dashboards across microfinance operations.

Organizational Benefits

- Improved operational efficiency through interactive dashboards
- Enhanced portfolio monitoring and risk management
- Data-driven decision-making for strategic planning
- Increased transparency and accountability in microfinance operations
- Optimized client and loan performance tracking
- Better reporting for stakeholders and regulators
- Improved KPI monitoring and performance benchmarking
- Streamlined data visualization and reporting processes
- Enhanced predictive analytics for forecasting financial trends
- Strengthened overall financial management in MFIs

Target Audiences

- Microfinance operations managers
- Portfolio managers and credit analysts
- Data analysts and business intelligence specialists
- Risk management and compliance officers
- IT and systems integration teams in MFIs
- Finance and reporting officers
- Internal auditors and performance evaluators
- Consultants supporting microfinance operations and analytics

Course Duration: 5 days

Course Modules

Module 1: Introduction to Business Intelligence for MFIs

- Overview of BI concepts in microfinance operations
- Importance of dashboards for decision-making
- Key performance indicators for MFIs
- Data sources and integration in microfinance institutions
- Case Study: Designing an operational dashboard for loan portfolio tracking

Module 2: Data Collection and Preprocessing

- Techniques for collecting accurate microfinance data
- Cleaning, validating, and transforming data
- Structuring datasets for dashboard reporting
- Ensuring consistency and reliability in portfolio data
- Case Study: Preprocessing loan and savings data for visualization

Module 3: Dashboard Design Principles

- Visual design best practices for clarity and usability
- Selecting appropriate charts, graphs, and KPI indicators
- Layout optimization for multiple user types
- Designing dashboards for mobile and desktop access
- Case Study: Redesigning an underperforming client insights dashboard

Module 4: Operational Dashboards for MFIs

- Monitoring daily microfinance operations
- Tracking loan disbursement, repayment, and arrears
- Visualizing branch and agent performance
- Identifying operational bottlenecks through dashboards
- Case Study: Real-time operational dashboard for a regional MFI branch

Module 5: Portfolio Performance Dashboards

- Measuring portfolio health and growth metrics
- Visualizing risk indicators and loan delinquency trends
- Monitoring portfolio diversification and client segments
- Enhancing predictive insights for portfolio decisions
- Case Study: Portfolio performance dashboard for a national MFI

Module 6: Financial Dashboards and KPIs

- Visualizing revenue, income, and expense metrics
- Monitoring operational and financial efficiency ratios
- Comparing budgeted vs. actual performance
- Aligning KPIs with strategic microfinance goals
- Case Study: Financial dashboard to track MFI sustainability metrics

Module 7: Risk and Compliance Dashboards

- Monitoring loan defaults, fraud indicators, and operational risk
- Tracking regulatory compliance metrics
- Early-warning systems through visual analytics
- Integrating risk management into dashboards

- Case Study: Compliance dashboard for loan portfolio monitoring

Module 8: Advanced Analytics and Predictive Dashboards

- Implementing predictive modeling for microfinance trends
- Using scenario analysis for portfolio forecasting
- Visualizing risk and opportunity metrics dynamically
- Enhancing strategic decision-making with predictive dashboards
- Case Study: Predictive dashboard for forecasting delinquency and growth

Training Methodology

- Instructor-led presentations on BI concepts and dashboard principles
- Hands-on exercises with real microfinance datasets
- Step-by-step dashboard creation workshops using popular BI tools
- Case study analysis and group discussions for practical learning
- Interactive exercises in KPI identification and predictive analytics
- Continuous feedback and performance assessment during the course

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price

23 Nov 2026	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

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