Power Business Intelligence for Finance Training Course

Professional Development Training Course Outline

Category	Business Intelligence	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Power Business Intelligence for Finance Training Course equips finance professionals with the analytical skills and data visualization capabilities required to drive smarter financial decisions. This course bridges the gap between finance and technology, enabling participants to transform complex financial datasets into actionable insights. By leveraging Power BI, finance teams can improve reporting accuracy, optimize financial operations, and enhance strategic decision-making. Participants will gain hands-on experience in building interactive dashboards, financial models, and predictive analytics to support organizational growth.

The course emphasizes practical applications in finance, including budgeting, forecasting, variance analysis, and investment analysis. Through real-world case studies, participants will understand how to interpret financial data trends, identify anomalies, and communicate findings effectively to stakeholders. With a focus on data-driven finance, this program empowers finance professionals to enhance performance, reduce risk, and deliver measurable business impact.

Programme Curriculum

Power Business Intelligence for Finance Training Course

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Course Objectives

1. Master Power BI desktop and service for finance analytics
2. Build interactive financial dashboards with dynamic visuals
3. Apply advanced DAX formulas for financial calculations
4. Perform budgeting, forecasting, and variance analysis efficiently
5. Integrate multiple financial data sources seamlessly
6. Leverage Power Query for data cleaning and transformation
7. Design real-time financial KPIs and scorecards
8. Utilize predictive analytics for financial planning
9. Automate financial reporting and consolidation processes
10. Develop scenario analysis and risk assessment models
11. Optimize cash flow analysis using data visualization
12. Enhance decision-making through storytelling with finance data
13. Implement governance and security in Power BI for financial data

Organizational Benefits

- Improved accuracy and efficiency in financial reporting
- Faster decision-making through real-time insights
- Enhanced data-driven strategic planning
- Reduced manual reporting efforts
- Streamlined budgeting and forecasting processes
- Improved transparency and audit readiness
- Increased cross-departmental collaboration
- Better monitoring of financial KPIs
- Minimized financial risk through predictive analytics
- Increased ROI from data-driven financial insights

Target Audiences

- Finance managers
- Financial analysts
- Accountants
- CFOs and finance directors
- Investment analysts
- Budget and planning professionals
- Controllers and internal auditors
- Business intelligence professionals

Course Duration: 5 days

Course Modules

Module 1: Introduction to Power BI for Finance

- Overview of Power BI interface and components
- Connecting financial data sources
- Understanding data types and financial tables
- Exploring basic data visualizations for finance
- Creating simple finance reports
- Case Study: Analyzing monthly expense trends

Module 2: Data Transformation and Modeling

- Power Query fundamentals for finance data
- Cleaning and preparing financial datasets
- Creating relationships between financial tables
- Building a data model for reporting
- Implementing data hierarchies and aggregations
- Case Study: Preparing a multi-department budget dataset

Module 3: Advanced DAX for Finance Analytics

- Calculated columns vs measures in finance datasets
- Time intelligence functions for financial analysis
- Advanced DAX for variance and ratio analysis
- Scenario calculations using DAX
- Financial KPIs with DAX
- Case Study: Forecasting revenue and expenses

Module 4: Financial Dashboards and Reporting

- Designing interactive finance dashboards
- Using slicers and filters for dynamic reporting
- Visualizing key financial metrics
- Drill-through and drill-down functionality
- Dashboard optimization for performance
- Case Study: Executive-level financial dashboard creation

Module 5: Budgeting, Forecasting, and Variance Analysis

- Budget input and allocation techniques
- Forecasting using historical financial data
- Variance analysis and reporting
- Scenario planning and sensitivity analysis
- Visualizing budget vs actual trends
- Case Study: Annual budget variance report

Module 6: Predictive Analytics and Financial Forecasting

- Overview of predictive models in finance
- Trend analysis and forecasting techniques
- Regression analysis for financial prediction
- Incorporating forecasts into dashboards
- Evaluating model accuracy and performance
- Case Study: Predicting quarterly cash flows

Module 7: Automation and Advanced Reporting

- Automating financial reports with Power BI
- Scheduled data refresh and alerts
- Sharing and collaboration with finance teams
- Exporting reports to Excel and PDF
- Integrating Power BI with other finance systems
- Case Study: Automated monthly finance report

Module 8: Governance, Security, and Best Practices

- Data governance for financial datasets
- Role-based access and security management
- Best practices for finance report design
- Ensuring audit readiness and compliance
- Documentation and version control in Power BI
- Case Study: Securing sensitive financial data

Training Methodology

- Instructor-led live sessions with practical exercises
- Hands-on labs for real-world financial scenarios
- Group exercises and collaborative projects
- Case study-based learning for application of concepts
- Interactive Q&A sessions with finance experts
- Post-training support with reference materials

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

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com