Training Course on Power BI for Finance Professionals

Professional Development Training Course Outline

Category	Business	**Duration**	10 Days
Base Fee	$3,000 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today's rapidly evolving financial landscape, the ability to transform complex financial data into actionable insights is paramount. This training course on **Power BI for Finance Professionals** equips individuals with the essential skills to leverage Microsoft's leading business intelligence tool. Participants will master the art of connecting to diverse financial data sources, building robust **data models**, and applying powerful **DAX (Data Analysis Expressions)** calculations to derive critical financial metrics and KPIs. The curriculum emphasizes creating dynamic and interactive **financial dashboards** and reports, enabling data-driven decision-making and enhanced communication of financial performance to stakeholders. By focusing on real-world financial scenarios and practical applications, this course empowers finance professionals to move beyond static spreadsheets and unlock the true potential of their financial data, driving efficiency and strategic advantage within their organizations.

This comprehensive training program is meticulously designed to cater to the unique needs of finance professionals, including financial analysts, accountants, controllers, and finance managers. The course delves into key areas such as **financial reporting automation**, **budgeting and forecasting with Power BI**, **variance analysis**, and the creation of insightful **financial visualizations**. Participants will gain hands-on experience in data preparation and transformation using **Power Query**, ensuring data accuracy and integrity. Furthermore, the training covers best practices for **data storytelling** with visuals and the secure sharing and collaboration of financial dashboards within the organization. By mastering Power BI, finance professionals can significantly enhance their analytical capabilities, streamline their workflows, and contribute strategically to their organization's financial success through impactful data-driven insights and presentations.

Programme Curriculum

Training Course on Power BI for Finance Professionals

Introduction

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Course Duration

10 days

Course Objectives

1. Gain a solid understanding of the Power BI interface and its core functionalities relevant to financial analysis.
2. Learn to seamlessly connect Power BI to various financial systems, databases, Excel files, and cloud services.
3. Acquire skills in cleaning, shaping, and transforming financial data for accurate analysis and reporting.
4. Understand and implement effective data modeling techniques to establish relationships between financial data tables.
5. Master the use of DAX to create calculated columns, measures, and time intelligence functions for financial analysis.
6. Design visually appealing and interactive dashboards to effectively communicate financial performance and insights.
7. Learn to build dynamic budgeting and forecasting models using Power BI's analytical capabilities.
8. Utilize Power BI to analyze budget-to-actual variances and identify key drivers.
9. Effectively present crucial financial metrics using appropriate Power BI visualizations.
10. Streamline and automate recurring financial reporting tasks to improve efficiency.
11. Learn to create compelling narratives with financial data visualizations for better understanding.
12. best practices for publishing and sharing Power BI reports and dashboards within an organization.

13. Develop the ability to extract meaningful insights from financial data to support strategic decision-making.

Organizational Benefits

- Automate manual reporting processes, freeing up finance professionals for more strategic tasks.
- Reduce errors associated with manual data manipulation and ensure data integrity through Power BI's robust data modeling and transformation capabilities.
- Provide timely and accurate financial insights through interactive dashboards, enabling data-driven strategic decisions.
- Facilitate seamless sharing and collaboration on financial data and reports across different departments and stakeholders.
- Eliminate the need for multiple disparate reporting tools and reduce the time spent on data consolidation and report generation.
- Uncover hidden trends and patterns in financial data through advanced analysis and visualization techniques.
- Present complex financial information in a clear, concise, and visually appealing manner to both financial and non-financial audiences.
- Improve the accuracy and transparency of financial reporting, aiding in meeting regulatory requirements.

Target Audience

1. Financial Analysts
2. Accountants
3. Finance Managers.
4. Financial Controllers.
5. Budget Analysts
6. Treasury Professionals.
7. Business Intelligence Analysts with a Finance Focus
8. Aspiring Finance Professionals.

Course Outline

Module 1: Introduction to Power BI for Finance

- Overview of Power BI and its benefits in financial analysis and reporting.
- Understanding the Power BI ecosystem: Desktop, Service, and Mobile.
- Navigating the Power BI Desktop interface and key components.
- Connecting to your first financial data source: Excel example.
- Basic data visualization concepts relevant to finance.

Module 2: Connecting to Financial Data Sources

- Connecting to various file-based data sources (CSV, TXT).
- Establishing connections with databases (SQL Server, Access).
- Connecting to cloud-based financial applications and services.
- Understanding data connectors and authentication methods.
- Best practices for managing data source connections.

Module 3: Data Transformation with Power Query

- Introduction to the Power Query Editor interface.
- Performing basic data cleaning operations (removing duplicates, handling blanks).
- Shaping data by renaming columns and changing data types.
- Combining data from multiple sources (append and merge queries).
- Creating custom columns and conditional logic in Power Query.

Module 4: Financial Data Modeling in Power BI

- Understanding relational database concepts and their application in Power BI.
- Creating and managing relationships between financial data tables.
- Understanding cardinality and filter direction in data models.
- Implementing best practices for designing efficient financial data models.
- Working with calculated tables for specific analytical needs.

Module 5: Introduction to DAX for Financial Professionals

- Understanding the basics of DAX syntax and data types.
- Differentiating between calculated columns and measures.
- Creating simple measures for aggregations (Sum, Average, Count).
- Understanding row context and filter context in DAX.
- Using basic DAX functions relevant to financial analysis.

Module 6: Advanced DAX Calculations for Finance

- Utilizing the CALCULATE function for context manipulation.
- Implementing time intelligence functions for year-over-year and month-over-month analysis.
- Creating measures for financial ratios and KPIs.
- Working with iterator functions (SUMX, AVERAGEX) for complex calculations.
- Implementing variables in DAX for efficient and readable formulas.

Module 7: Creating Basic Financial Visualizations

- Understanding different types of charts and their suitability for financial data.
- Creating bar charts, line charts, and pie charts to represent financial information.
- Using table and matrix visuals for detailed financial reporting.
- Formatting visuals for clarity and professional presentation.
- Adding tooltips and interactive elements to visualizations.

Module 8: Building Interactive Financial Dashboards

- Designing effective dashboard layouts for financial performance monitoring.
- Using slicers and filters for interactive data exploration.
- Implementing drill-down and drill-through functionality.
- Adding cards and KPIs to highlight key financial metrics.
- Ensuring dashboard responsiveness for different screen sizes.

Module 9: Budgeting and Forecasting with Power BI

- Connecting budget data to Power BI and integrating it with actuals.
- Creating measures to calculate budget variances.
- Visualizing budget vs. actual performance using appropriate charts.
- Developing basic forecasting models using trend analysis.
- Implementing what-if analysis using parameters.

Module 10: Variance Analysis in Power BI

- Calculating absolute and percentage variances for revenue and expenses.
- Creating dynamic variance reports using DAX measures.
- Visualizing variances effectively to identify key areas of concern.
- Implementing conditional formatting to highlight significant variances.
- Analyzing the drivers behind budget variances.

Module 11: Visualizing Key Financial Performance Indicators (KPIs)

- Identifying relevant financial KPIs for different stakeholders.
- Creating KPI visuals to track progress against targets.
- Using gauge charts and bullet charts for KPI visualization.
- Implementing traffic light indicators for performance status.
- Contextualizing KPIs with trend lines and comparison values.

Module 12: Automating Financial Reporting

- Setting up scheduled data refreshes in the Power BI Service.
- Creating email subscriptions for automated report distribution.
- Understanding the use of Power Automate with Power BI for workflow automation.
- Implementing row-level security for controlled report access.
- Best practices for managing and maintaining automated reports.

Module 13: Data Storytelling with Financial Visuals

- Structuring financial reports to convey a clear narrative.
- Using annotations and text boxes to highlight key insights.
- Applying consistent design principles for professional-looking reports.
- Tailoring the story to different target audiences.
- Combining visuals and text effectively to communicate financial performance.

Module 14: Sharing and Collaboration in Power BI

- Publishing reports and dashboards to the Power BI Service.
- Creating workspaces for team collaboration.
- Sharing reports with different levels of access permissions.
- Embedding Power BI reports in other applications (e.g., SharePoint, Teams).
- Understanding licensing options for sharing and collaboration.

Module 15: Advanced Financial Analysis Techniques

- Performing trend analysis and identifying seasonality in financial data.
- Implementing cohort analysis to understand customer or product performance over time.
- Using Power BI's AI features for anomaly detection and key influencers.
- Integrating R or Python visuals for advanced statistical analysis.
- Best practices for continuous learning and staying updated with Power BI features for finance.

Training Methodology

This training course will employ a blended learning approach that combines:

- **Instructor-Led Sessions:** Engaging live sessions with expert instructors who will explain concepts, demonstrate techniques, and answer questions.
- **Hands-On Labs and Exercises:** Practical exercises and real-world case studies to reinforce learning and provide hands-on experience with Power BI using financial data.
- **Interactive Discussions:** Opportunities for participants to share their experiences, discuss challenges, and learn from each other.
- **Q&A Sessions:** Dedicated time for participants to ask questions and receive clarification on specific topics.
- **Access to Course Materials:** Comprehensive course materials, including presentations, sample datasets, and step-by-step guides.
- **Optional Project Work:** An opportunity for participants to apply their learning to a financial dataset of their choice and build a comprehensive Power BI solution.

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	04 Dec 2026	Online	$2,000
23 Nov 2026	04 Dec 2026	Physical	$3,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$9,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$12,000

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