MERCURY

Optimizing Procurement with Power BI

8 – 12 March 2027
Barcelona (Spain)



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Optimizing Procurement with Power BI

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Introduction

The Optimizing Procurement with Power BI course equips professionals with practical knowledge to enhance procurement efficiency using Power BI tools. Participants will learn to analyze purchasing data, identify cost-saving opportunities, and streamline procurement processes. The course emphasizes actionable insights to enable data-driven decision-making in supplier management and contract evaluation. It combines theoretical foundations with hands-on scenarios to ensure practical application. By the end, participants will confidently create dashboards, reports, and analytics to optimize procurement operations. This program is ideal for professionals aiming to modernize procurement with advanced analytics.

Targeted Groups

The Optimizing Procurement with Power BI course targets professionals seeking specialized knowledge and skills:

- Procurement managers and officers.
- Supply chain analysts.
- Finance professionals are involved in purchasing.
- Data analysts supporting procurement functions.
- Strategic sourcing specialists.
- Operations managers oversee supplier performance.
- IT staff are integrating procurement systems.
- Consultants advising on procurement optimization.

Course Objectives

Participants will achieve the following objectives by completing Optimizing Procurement with Power BI:

- Understand the fundamentals of Power BI for procurement analysis.
- Create interactive dashboards for procurement metrics.
- Analyze supplier performance using data visualization.
- Monitor procurement KPIs effectively.
- Identify cost-saving opportunities from historical data.
- Streamline reporting workflows and automate processes.
- Evaluate supplier risk and compliance.
- Enhance data-driven decision-making in procurement.
- Integrate Power BI with procurement software.
- Develop actionable procurement insights.

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Targeted Competencies

Participants will gain the following competencies during the program:

- Proficiency in using Power BI for procurement data.
- Ability to design dashboards for procurement KPIs.
- Skills in visualizing supplier performance trends.
- Capability to automate procurement reporting.
- Knowledge of cost analysis and trend forecasting.
- Understanding of procurement risk assessment.
- Competence in integrating procurement and analytics tools.
- Skill in generating actionable procurement insights.
- Efficiency in decision-making based on data analysis.

Studying Scenarios

In this training, participants will develop their skills through the analysis of the following scenarios:

- Tracking supplier delivery performance using dashboards.
- Analyzing purchase order trends for cost optimization.
- Evaluating contract compliance through data visualization.
- Monitoring procurement KPIs to identify inefficiencies.
- Forecasting procurement needs based on historical data.
- Assessing supplier risk and performance metrics.
- Creating automated reports for management decision-making.

Course Content

Unit 1: Introduction to Power BI in Procurement

- Overview of Power BI for procurement analysis.
- Key features for data integration and visualization.
- Connecting procurement databases to Power BI.
- Understanding procurement KPIs and metrics.
- Overview of dashboards, reports, and analytics.
- Introduction to data-driven procurement decisions.

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Unit 2: Data Preparation and Transformation

- Importing procurement datasets into Power BI.
- Cleaning and transforming purchasing data.
- Structuring data for meaningful analysis.
- Combining multiple data sources for procurement insights.
- Using Power Query to automate data workflows.
- Understanding relationships between procurement tables.

Unit 3: Procurement Analytics and Visualization

- Creating procurement dashboards and reports.
- Visualizing supplier performance and delivery trends.
- Analyzing cost trends across categories and regions.
- Tracking KPIs such as purchase order cycle time.
- Using conditional formatting to highlight risks.
- Building interactive charts for decision-making.
- Applying filters and slicers for detailed insights.

Unit 4: Advanced Reporting and Automation

- Automating procurement reporting with Power BI.
- Scheduling data refreshes for real-time insights.
- Integrating procurement systems with Power BI dashboards.
- Using DAX for advanced calculations and metrics.
- Creating alerts for KPI deviations.
- Optimizing dashboards for mobile and desktop use.

Unit 5: Strategic Procurement Insights

- Evaluating supplier risk and compliance data.
- Identifying opportunities for cost reduction.
- Analyzing procurement trends for strategic planning.
- Using predictive analytics for demand forecasting.
- Supporting data-driven supplier negotiations.
- Enhancing procurement efficiency through insights.

Final Insights & Key Takeaways

Participants will leave equipped to transform procurement with data-driven strategies. Power BI mastery enables optimized supplier management and cost efficiency.