



Power BI for Finance Professionals



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Introduction

The Power BI for Finance Professionals course develops essential knowledge for financial data analysis and reporting. It focuses on creating clear reports, dashboards, and management insights for finance functions. Participants will explore Power Query, data preparation, data modeling, DAX calculations, and financial visualization. The program covers revenue, expenses, profitability, cash flow, financial ratios, budgeting, and forecasting. Participants examine actual-versus-budget analysis and methods for presenting financial results through decision-oriented dashboards. They will understand how Power BI can strengthen financial reporting and support evidence-based financial management.

Targeted Groups

This Power BI for Finance Professionals training targets professionals seeking knowledge and skills:

- Finance professionals improving financial reporting capabilities.
- Financial analysts performing financial data analysis.
- Accountants analyzing financial information.
- Finance managers monitoring performance.
- Financial controllers reviewing financial statements and variances.
- FP&A professionals supporting planning and forecasting.
- Budget analysts comparing actual and planned performance.
- Treasury professionals analyzing cash flow.

Course Objectives

Participants will achieve the following objectives by completing the Power BI for Finance Professionals course:

- Understand Power BI applications in finance.
- Explain its role in financial reporting and analysis.
- Identify appropriate financial data sources.
- Prepare and transform financial datasets.
- Understand financial data modeling principles.
- Develop structured financial reporting models.
- Apply DAX to financial calculations.
- Analyze revenue, expenses, profit, and margins.
- Compare actual results with budgets and forecasts.
- Perform financial variance analysis.
- Analyze cash flow and liquidity.
- Design finance-focused dashboards.
- Apply interactive filtering and drill-down techniques.
- Develop relevant financial KPIs.
- Communicate financial insights to management.
- Evaluate financial reporting accuracy.

Targeted Competencies

Participants will gain the following competencies during the Power BI for Finance Professionals program:

- Financial data analysis using Power BI.
- Financial reporting and dashboard development.
- Power Query data preparation and transformation.
- Financial data modeling and relationships.
- DAX-based financial calculations.
- Budget-versus-actual analysis.
- Revenue and expense analysis.
- Profitability and margin analysis.
- Cash flow analysis.
- Financial KPI development.
- Interactive financial visualization.
- Management reporting and insight communication.

Real-world Case Studies

In this Power BI for Finance Professionals training, participants develop skills through the following cases:

- Analyze revenue, expenses, profit, and margins through a financial dashboard.
- Compare actual results with budgets and identify significant variances.
- Examine departmental costs and identify unfavorable spending patterns.
- Analyze cash flow movements and liquidity indicators.
- Assess profitability across products, customers, or business units.
- Review financial KPIs and interpret performance trends.

Course Content

Unit 1: Power BI Foundations for Finance

- Define Power BI and its role in finance.
- Examine Power BI components for financial reporting.
- Explore business intelligence applications in finance.
- Distinguish static reporting from interactive financial analysis.
- Identify common financial data sources and structures.
- Examine financial reporting requirements and analytical questions.
- Identify suitable financial KPIs for management analysis.

Unit 2: Financial Data Preparation with Power Query

- Examine Power Query for financial data preparation.
- Identify common quality issues in finance datasets.
- Remove duplicate records and handle missing values.
- Apply appropriate data types to financial fields.
- Transform and standardize financial columns.
- Combine datasets using append and merge operations.
- Prepare ledger, budget, and transaction data.

Unit 3: Financial Data Modeling and DAX

- Explain financial data modeling principles.
- Examine fact and dimension tables and their relationships.
- Explore star-schema structures for financial analysis.
- Understand filter context, calculated columns, and measures.
- Develop DAX measures for financial calculations.
- Calculate profit, margins, and financial variances.
- Apply MTD, QTD, and YTD calculations.
- Develop actual-versus-budget measures.

Unit 4: Financial Reporting and Dashboard Development

- Examine principles of financial dashboard design.
- Select appropriate visuals for financial reporting.
- Analyze revenue, expense, profit, and margin trends.
- Build interactive financial statement reports.
- Develop executive financial KPI dashboards.
- Apply slicers, filters, drill-down, and drill-through.
- Use waterfall charts for variance analysis.
- Compare actual, budget, forecast, and prior-period results.

Unit 5: Advanced Finance Analytics and Decision Support

- Examine advanced financial analysis using Power BI.
- Analyze profitability across products, customers, and business units.
- Evaluate cost structures and spending efficiency.
- Analyze cash flow and liquidity performance.
- Interpret key financial ratios and performance indicators.
- Apply scenario, what-if, and forecasting analysis.
- Identify significant financial trends, exceptions, and risks.
- Translate analytical findings into management insights.

Final Insights & Key Takeaways

Participants develop the ability to use Power BI for structured financial analysis, reporting, dashboard development, and management decision support. The course integrates financial data preparation, modeling, DAX, KPI analysis, variance analysis, profitability analysis, cash flow analysis, and financial forecasting.