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Global Learning for Operational Leaders

ACCOUNTING AND FINANCE | AF-004

Power BI for Finance Professionals

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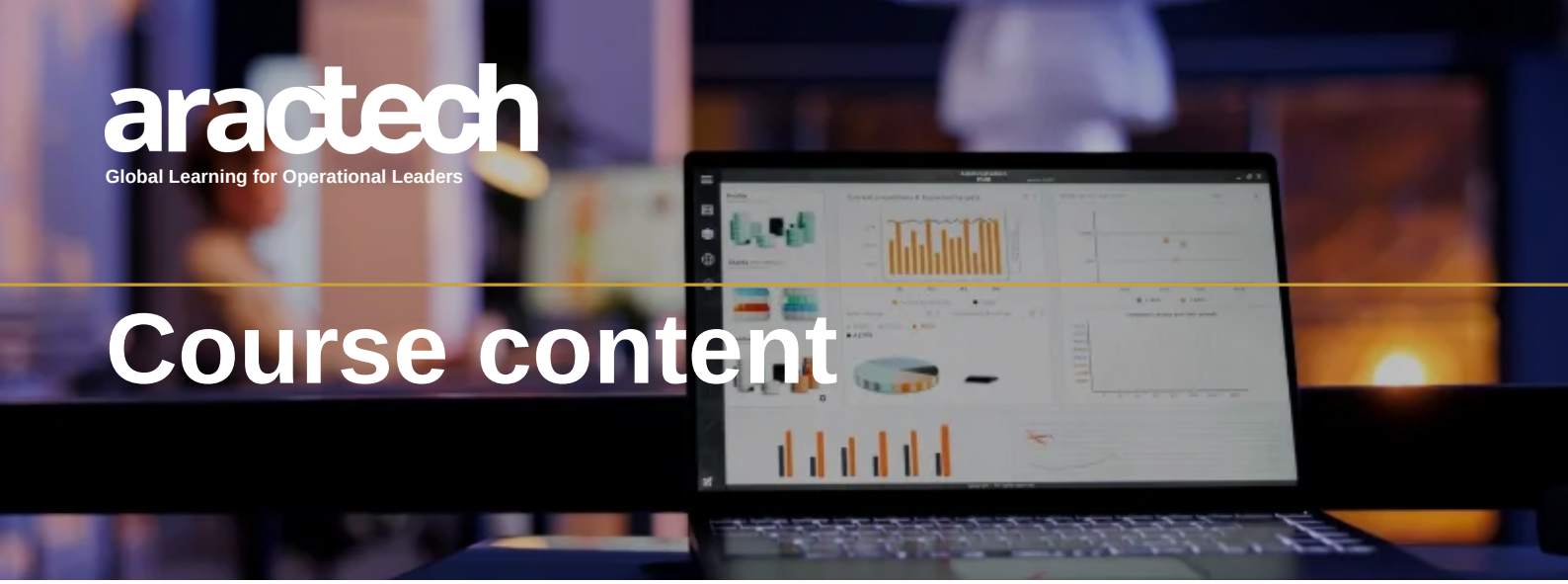

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Course content

Why Attend

Finance professionals are expected to deliver faster insights, more accurate reporting, and real-time financial analysis. Traditional spreadsheet reporting often limits visibility, slows decision-making, and increases the risk of manual errors.

Power BI enables finance teams to transform raw financial data into interactive dashboards, automated reports, and dynamic insights that support strategic decision-making. It bridges the gap between financial data and business intelligence.

Course Methodology

• Step-by-step Power BI demonstrations

• Practical exercises using financial datasets

• Dashboard-building workshops

• Real-world finance reporting scenarios

• Guided data modeling and visualization practice

Course Objectives

• Understand the fundamentals of Power BI for financial analysis

• Import, clean, and model financial data

• Build interactive financial dashboards and reports

• Analyze key financial KPIs and performance metrics

• Automate financial reporting processes

• Improve data-driven financial decision-making

Target Audience

• This course is suitable for:

• Financial Analysts and Finance Managers

• Accountants and Controllers

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Course outline

Detailed course outline

Day-by-day outline for Power BI for Finance Professionals.

Day 1 - Introduction to Power BI and Financial Data

• Overview of Power BI and its role in finance

• Power BI ecosystem (Desktop, Service, Dataflows)

• Connecting to financial data sources

• Introduction to data structure and modeling

• Basic navigation and interface setup

• Importing financial datasets

Day 2 - Data Preparation and Financial Data Modeling

• Data cleaning using Power Query

• Structuring financial data for analysis

• Relationships between financial tables

• Building data models for reporting

• Creating calculated columns

• Practical exercise: preparing financial dataset

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Day 3 - Financial Analysis and KPI Development

• Key financial KPIs (profitability, liquidity, efficiency)

• Creating measures using DAX basics

• Time intelligence in financial reporting

• Variance analysis (budget vs actual)

• Trend and performance analysis

• Case study: financial performance dashboard

Day 4 - Dashboard Design and Visualization

• Principles of effective financial dashboards

• Creating charts, tables, and visual reports

• Interactive filters and slicers

• Financial storytelling techniques

• Designing executive-level dashboards

• Practical dashboard building session

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Day 5 - Advanced Reporting and Automation

• Advanced DAX concepts for finance

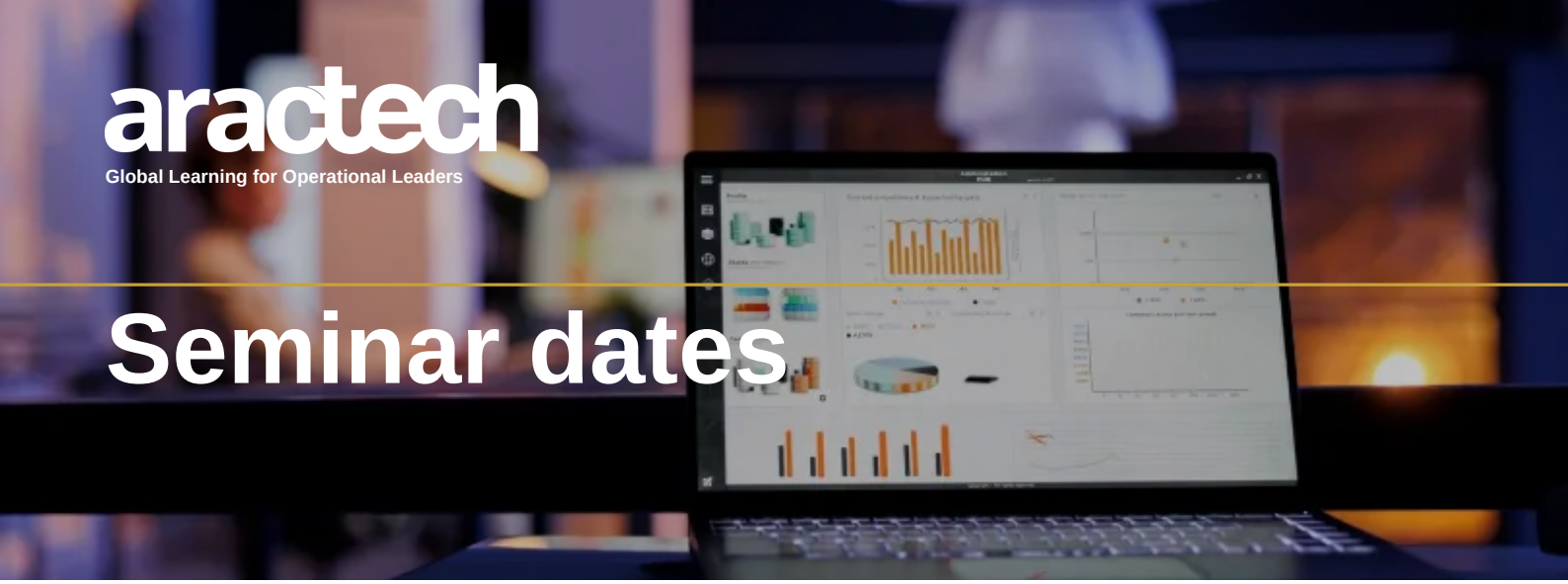
• Automating financial reports and refreshes

• Publishing and sharing reports in Power BI Service

• Security and data access control

• Best practices in financial reporting automation

• Final project: complete financial dashboard



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Seminar dates

Available seminar dates

Live dates and pricing for Power BI for Finance Professionals generated from the course details page.

Date	Location	Format	Fee
11 - 15 May 2026	Istanbul	Classroom	**€1,995**
8 - 12 June 2026	Rome	Classroom	**€2,975**
6 - 10 July 2026	Munich	Classroom	**€2,415**
10 - 14 August 2026	Amsterdam	Classroom	**€2,975**
14 - 18 September 2026	London	Classroom	**€2,940**
5 - 9 October 2026	Istanbul	Classroom	**€1,995**
16 - 20 November 2026	Vienna	Classroom	**€2,975**

Live online option	Online delivery is available at €1,250.