

Power BI for Financial Analytics

Course Description:

This intensive 4-day program equips participants with the skills to design, build, and optimize Power BI reports and dashboards tailored for financial data analytics. The course blends theory with hands-on labs, guiding learners through data preparation, visualization best practices, advanced DAX calculations, and enterprise deployment strategies. By the end, participants will be able to deliver interactive dashboards and financial analytics solutions that drive informed decision-making across organizations.

Duration: 4 Days (32 Hours)

Audience: Data analysts, BI developers, financial analysts

Prerequisites: Basic data analysis knowledge, familiarity with Excel/SQL

Learning Objectives:

- Build and optimize reports and dashboards
- Apply DAX for financial KPIs and time intelligence
- Design advanced financial analytics solutions
- Share and secure dashboards for enterprise use

Content Coverage :

Day 1 – Foundations of Power BI Reporting

Module 1: Introduction & Environment Setup

- Power BI ecosystem overview
- Installing and configuring Power BI Desktop

- Connecting to financial data sources (Excel, SQL, ERP)
- Understanding data models and relationships

Module 2: Data Preparation with Power Query

- Importing and cleaning raw financial datasets
- Transformations: merge, append, pivot/unpivot
- Handling missing values and outliers
- Creating reusable queries for financial reporting

Module 3: Basic Report Building

- Adding visuals: tables, charts, KPIs
- Formatting and customizing visuals
- Using slicers and filters for financial data
- Hands-on: Building a monthly expense report

Day 2 – Designing Interactive Dashboards

Module 4: Dashboard Design Principles

- Best practices for financial dashboards
- Choosing the right visuals for KPIs
- Layout and storytelling with data
- Common mistakes to avoid

Module 5: Advanced Visualizations

- Cards, gauges, and KPI indicators
- Drill-through and drill-down techniques
- Hierarchies for financial reporting (region, product, time)

- Hands-on: CFO dashboard design

Module 6: Interactivity & User Experience

- Bookmarks and navigation buttons
- Dynamic filtering with slicers
- Cross-highlighting between visuals
- Custom themes for corporate branding

Day 3 – Financial Data Analytics with DAX

Module 7: DAX Fundamentals

- Measures vs calculated columns
- Syntax and evaluation context
- Aggregations for financial metrics
- Hands-on: Creating revenue measures

Module 8: Time Intelligence Functions

- YTD, QTD, MTD calculations
- Rolling averages and moving totals
- Period-over-period comparisons
- Hands-on: Variance analysis

Module 9: Financial KPIs & Metrics

- ROI, profit margin, net income
- Budget vs actual analysis
- Forecasting with DAX

- Scenario modeling for financial planning

Day 4 – Advanced Financial Analytics & Deployment

Module 10: Advanced Visualization Techniques

- Waterfall charts for profit/loss
- Decomposition tree for root cause analysis
- Financial trend analysis with line charts
- Hands-on: Building a variance dashboard

Module 11: Performance Optimization

- Data model optimization for large datasets
- Aggregations and composite models
- Query diagnostics and performance tuning
- Best practices for enterprise financial reporting

Module 12: Publishing & Sharing Dashboards

- Power BI Service overview
- Workspace management and app deployment
- Row-level security for financial data
- Case study: End-to-end financial analytics solution