



**British Training**

**Mastering Financial Analytics with Power BI - From Data to Decisions  
Training Course**

**#FB1489**

# **Mastering Financial Analytics with Power BI - From Data to Decisions**

## **Training Course**

### **Introduction:**

The British Training Center is proud to present a specialized program designed to empower finance and accounting professionals with cutting-edge tools for data-driven decision-making. In an era where financial agility and accuracy are paramount, mastering Power BI transforms complex data into actionable insights. This course bridges the gap between traditional financial practices and modern analytics, equipping participants with the skills to streamline reporting, enhance forecasting, and deliver strategic value.

### **Training Objectives and Impact:**

#### **By the end of this program, participants will be able to:**

- Transform raw financial data into interactive dashboards using Power BI.
- Automate repetitive accounting tasks through advanced query editing and data modeling.
- Design custom financial reports aligned with industry standards (e.g., IFRS, GAAP).
- Integrate Power BI with Excel and ERP systems for seamless data consolidation.
- Apply DAX formulas to perform complex financial calculations and scenario analysis.
- Utilize AI-driven visuals to identify trends, risks, and opportunities in financial datasets.

### **Targeted Competencies and Skills:**

- Data visualization and dashboard design.
- Financial data modeling and transformation.
- Advanced DAX formula implementation.
- Automation of accounting workflows.
- Integration of multi-source financial data.
- Collaborative reporting and stakeholder communication.

### **Target Audience:**

#### **This program is tailored for:**

- Finance managers and analysts.
- Accountants and auditors.
- Financial controllers and CFOs.
- Business intelligence professionals in finance sectors.
- Professionals seeking to transition into data-driven finance roles.

## **Course Content:**

### **Unit One - Introduction to Power BI in Finance and Accounting:**

- Overview of Power BI and its relevance to finance.
- Navigating the Power BI interface: Key tools for financial workflows.
- Connecting to financial data sources (Excel, SQL, cloud databases).
- Best practices for data security and compliance in finance.
- Case study: Simplifying month-end closing processes.

### **Unit Two - Data Preparation and Transformation for Financial Analysis:**

- Cleansing and structuring raw financial data using Power Query.
- Merging datasets from multiple departments (AP, AR, GL).
- Creating calculated columns for accruals and deferrals.
- Automating data refresh schedules for real-time reporting.
- Handling currency conversions and multicurrency consolidations.

### **Unit Three - Financial Modeling and DAX for Accounting Scenarios:**

- Building dynamic financial models with relationships and hierarchies.
- Writing DAX formulas for YTD, MTD, and variance analysis.
- Scenario modeling: Budget vs. Actual, cash flow forecasting.
- Implementing rolling averages and cohort analysis.
- Debugging and optimizing DAX for large datasets.

### **Unit Four - Advanced Reporting and Visualization for Finance:**

- Designing CFO-ready dashboards: KPIs, profit margins, and liquidity ratios.
- Using custom visuals for trend analysis and anomaly detection.
- Drill-through reports for granular audit trails.
- Embedding narrative summaries with Power BI's storytelling features.
- Exporting reports to PDF/PPT for board presentations.

### **Unit Five - Deployment, Collaboration, and Real-World Applications:**

- Publishing reports to Power BI Service for organizational access.
- Setting up role-based security for sensitive financial data.
- Collaborative workflows with Power BI Workspaces.
- Integrating Power BI with Power Automate for approval workflows.
- Capstone project: End-to-end financial analysis from data to boardroom insights.