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ACCOUNTING AND FINANCE | AF-032

Business Intelligence & Analytics for Finance Professionals

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Course content

Why Attend

Finance functions are increasingly expected to deliver more than accurate accounting records and historical financial reports. Modern finance professionals must transform large volumes of financial and operational information into meaningful insights that support profitability, cost control, financial planning, risk management, and strategic decision-making.

However, financial information is often distributed across enterprise resource planning (ERP) systems, accounting applications, spreadsheets, budgeting platforms, and operational databases. Fragmented data, inconsistent reporting definitions, repetitive manual processes, and limited analytical capabilities can prevent finance teams from providing timely and reliable management information.

Business intelligence (BI) and financial analytics address these challenges by combining data integration, financial modelling, performance measurement, interactive visualisation, and analytical techniques. These capabilities enable finance professionals to monitor financial results, investigate variances, identify emerging trends, improve forecasts, and communicate insights more effectively.

The Business Intelligence & Analytics for Finance Professionals course provides participants with a practical framework for applying business intelligence and data analytics to financial management. Participants explore financial data preparation, data modelling, KPI development, profitability analysis, budgeting analytics, forecasting, dashboard design, and management reporting.

The programme introduces practical applications of Microsoft Excel, Power Query, Power Pivot, and Microsoft Power BI, alongside financial analytical techniques and responsible use of predictive analytics.

Through hands-on exercises and realistic financial datasets, participants develop the ability to build reliable financial reporting solutions, analyse business performance, and translate analytical findings into actionable management recommendations.

Professional Problems This Course Is Designed to Solve

• Fragmented financial information: Integrating data from accounting systems, ERP platforms, spreadsheets, and operational sources into consistent analytical datasets.

• Time-consuming financial reporting: Reducing repetitive data preparation, reconciliation, and report production through automated data transformation and refreshable reporting models.

• Limited visibility of financial performance: Developing interactive dashboards that provide timely insights into profitability, revenue, expenditure, cash flow, and working capital.

Course content

Why Attend

• Weak budget and forecast analysis: Applying financial analytics to investigate variances, evaluate planning assumptions, and improve forecasting decisions.

• Inconsistent financial KPIs: Establishing standard definitions, calculation methods, reporting responsibilities, and performance targets across departments.

• Difficulty identifying financial trends and risks: Using analytical techniques to detect unusual transactions, changing cost patterns, liquidity pressures, and performance deterioration.

• Poor communication of financial insights: Transforming complex financial data into clear visualisations, executive reports, and decision-focused recommendations.

Course Methodology

The programme combines instructor-led discussions, financial analytics demonstrations, practical data preparation exercises, business intelligence workshops, dashboard development activities, and financial performance case studies.

Participants work with realistic datasets covering general ledger transactions, sales revenue, operating expenses, budgets, accounts receivable, accounts payable, and cash flow information.

Hands-on activities use Excel-based analytical techniques, Power Query, Power Pivot, and Power BI concepts to demonstrate financial data integration, analytical modelling, performance calculations, and interactive reporting.

The training emphasises data accuracy, analytical interpretation, financial relevance, and the practical application of business intelligence tools to everyday finance responsibilities.

Course Objectives

By the end of this course, participants will be able to:

• Explain the role of business intelligence and analytics in modern financial management

• Identify financial data sources and evaluate data quality requirements

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Course Objectives

- Prepare, clean, consolidate, and transform financial datasets
- Understand financial data modelling and relationships between accounting and operational information
- Develop meaningful financial KPIs and performance measurement frameworks
- Apply analytical techniques to revenue, cost, profitability, and working capital information
- Perform budget-versus-actual analysis and financial variance investigation
- Apply forecasting and scenario analysis to financial planning
- Build interactive financial dashboards and management reports
- Use Excel, Power Query, Power Pivot, and Power BI for financial analysis
- Evaluate data governance, reporting accuracy, and access control considerations
- Communicate financial insights and recommendations to management stakeholders

Target Audience

This course is suitable for:

- Finance managers and financial controllers
- Financial planning and analysis professionals
- Management accountants and senior accountants
- Financial analysts and business finance partners
- Budget managers and cost control specialists
- Treasury and working capital professionals
- Financial reporting and management information specialists
- Internal auditors and financial risk analysts
- Business intelligence professionals supporting finance functions
- Finance transformation and financial systems professionals

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Target Competencies

Participants will develop competencies in:

- Financial business intelligence
- Financial data preparation and integration
- Financial data modelling
- Financial KPI design and measurement
- Revenue and profitability analytics
- Budget and variance analysis
- Financial forecasting and scenario modelling
- Working capital and cash flow analytics
- Interactive financial dashboard development
- Data-driven financial decision-making

Course outline

Day 1: Business Intelligence Foundations and Financial Data Preparation

- Understanding business intelligence, descriptive analytics, diagnostic analytics, predictive analytics, and their applications within finance functions
- Identifying financial data sources, including ERP systems, general ledgers, budgeting platforms, banking records, and operational databases
- Evaluating financial data quality through completeness, accuracy, consistency, timeliness, and reconciliation requirements
- Applying Power Query techniques to import, clean, standardise, merge, and consolidate financial datasets
- Understanding financial data structures, chart of accounts mapping, reporting dimensions, and relationships between financial and operational information

Course content

Course outline

• Practical workshop: Preparing an integrated financial dataset from general ledger, budget, and operational records for management reporting

Day 2: Financial Data Modelling, KPI Development and Profitability Analytics

• Developing financial data models using fact tables, dimension tables, account classifications, reporting periods, and organisational hierarchies

• Understanding Power Pivot and Power BI data modelling principles, including table relationships, calculated measures, and filter behaviour

• Establishing financial KPIs covering revenue growth, gross margin, operating margin, return on investment, cost efficiency, and financial productivity

• Applying financial analysis techniques to evaluate profitability by product, customer, department, business unit, and operating segment

• Using DAX concepts and analytical calculations to develop financial ratios, period comparisons, cumulative results, and performance measures

• Practical exercise: Building a financial performance model with revenue, expenditure, profitability, and departmental KPI calculations

Day 3: Budget Analytics, Forecasting and Financial Performance Evaluation

• Integrating budget, actual, and forecast data to establish consistent financial performance reporting structures

• Performing budget-versus-actual analysis using absolute variances, percentage variances, financial trends, and operational drivers

• Applying diagnostic analytics to investigate revenue shortfalls, expenditure increases, margin deterioration, and departmental performance differences

• Developing financial forecasting models using historical trends, business drivers, assumptions, and rolling forecast techniques

• Applying sensitivity and scenario analysis to evaluate changes in sales, pricing, costs, inflation, and financial performance

Course content

Course outline

• Practical workshop: Developing a financial planning and variance analysis model with forecast scenarios, performance indicators, and management explanations

Day 4: Working Capital Analytics, Financial Risk Indicators and Interactive Dashboards

• Analysing accounts receivable through ageing reports, collection trends, overdue balances, customer concentration, and days sales outstanding

• Evaluating accounts payable, supplier payment patterns, cash conversion cycles, and working capital efficiency

• Developing cash flow analytics to monitor liquidity movements, operating cash generation, payment commitments, and short-term funding requirements

• Identifying unusual financial patterns and potential reporting exceptions through trend analysis, transaction comparisons, and exception indicators

• Designing interactive financial dashboards using Power BI or Excel with charts, KPI cards, slicers, filters, and financial performance summaries

• Dashboard workshop: Creating an interactive financial management dashboard covering profitability, working capital, budget performance, and liquidity indicators

Day 5: Financial Reporting Automation, Data Governance and Analytical Decision-Making

• Developing automated financial reporting workflows using Power Query refresh processes, reusable data models, and standardised reporting templates

• Applying financial data governance principles covering data ownership, access permissions, confidentiality, validation, and reporting consistency

• Evaluating the practical use of predictive analytics and artificial intelligence in financial forecasting, anomaly identification, and management reporting

• Communicating financial insights through executive dashboards, analytical commentary, visual storytelling, and decision-focused financial recommendations

• Establishing a financial business intelligence improvement roadmap covering technology, analytical capabilities, reporting processes, and performance measurement

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Course outline

• Capstone exercise: Developing and presenting an Integrated Financial Business Intelligence Solution incorporating data preparation, financial modelling, KPI analysis, budget comparisons, working capital analytics, interactive dashboards, and management recommendations

Seminar dates

Available seminar dates

Live dates and pricing for Business Intelligence & Analytics for Finance Professionals generated from the course details page.

Date	Location	Format	Fee
Dates on request	Venue on request	Classroom	**Contact us**

Live online option	Online delivery is available at €1,850.-.