informatech

ACCOUNTING AND FINANCE | AF-004

Power BI for Finance Professionals

UK
+44 33 000 111 90
info@informatech.co.uk
https://informatech.uk
63-66 Hatton Garden Hatton Garden
EC1N 8LE , London

NL
+31 85 74 444 46
info@infomatech.nl
https://infomatech.nl
Waarderweg 50 - 2031PB
Haarlem - Netherlands

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.

This course is designed to help finance professionals develop practical Power BI skills to analyze financial performance, build dashboards, automate reporting, and improve financial decision-making across the organization.

Course Methodology

This programme focuses on hands-on learning and real financial applications:

- 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

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

- 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

Course content

Course Objectives

- Automate financial reporting processes
- Improve data-driven financial decision-making
- Present financial insights through visual storytelling

Target Audience

This course is suitable for:

- Financial Analysts and Finance Managers
- Accountants and Controllers
- Budgeting and Planning Professionals
- Auditors and Compliance Officers
- Business and Data Analysts in finance
- Professionals involved in financial reporting and analysis

Target Competencies

Participants will develop competencies in:

- Financial data modeling in Power BI
- Dashboard design and visualization
- Financial reporting automation
- KPI tracking and performance analysis
- Data cleaning and transformation (Power Query basics)
- Analytical thinking for financial decision-making
- Data storytelling for finance stakeholders

Course content

Course outline

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

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

Course content

Course outline

- 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

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

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
8 - 12 June 2026	Rome - Italy	Classroom	**€4,250.-**
6 - 10 July 2026	Munich - Germany	Classroom	**€3,450.-**
10 - 14 August 2026	Amsterdam - Netherlands	Classroom	**€4,250.-**
14 - 18 September 2026	London - U.K	Classroom	**€4,200.-**
5 - 9 October 2026	Istanbul - Turkey	Classroom	**€2,850.-**
16 - 20 November 2026	Vienna - Austria	Classroom	**€4,250.-**
7 - 11 December 2026	Barcelona - Spain	Classroom	**€3,850.-**

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