



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.

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

- Explain the role of business intelligence and analytics in modern financial management
- Identify financial data sources and evaluate data quality requirements
- 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

Course content

- Apply analytical techniques to revenue, cost, profitability, and working capital information

Target Audience

- This course is suitable for:
- Finance managers and financial controllers
- Financial planning and analysis professionals
- Management accountants and senior accountants

Course outline

Detailed course outline

Day-by-day outline for Business Intelligence & Analytics for Finance Professionals.

Day 1 - Business Intelligence Foundations and Financial Data Preparation

- 09:00-09:39 | Understanding business intelligence, descriptive analytics, diagnostic analytics, predictive analytics, and their applications within finance functions
- 09:39-10:18 | Identifying financial data sources, including ERP systems, general ledgers, budgeting platforms, banking records, and operational databases
- 10:18-10:57 | Evaluating financial data quality through completeness, accuracy, consistency, timeliness, and reconciliation requirements
- 10:57-11:00 | Applying Power Query techniques to import, clean, standardise, merge, and consolidate financial datasets
- 11:00-11:30 | Coffee break
- 11:30-12:05 | Applying Power Query techniques to import, clean, standardise, merge, and consolidate financial datasets (continued)
- 12:05-12:43 | Understanding financial data structures, chart of accounts mapping, reporting dimensions, and relationships between financial and operational information
- 12:43-14:00 | Practical workshop: Preparing an integrated financial dataset from general ledger, budget, and operational records for management reporting

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

- 09:00-10:00 | Developing financial data models using fact tables, dimension tables, account classifications, reporting periods, and organisational hierarchies
- 10:00-10:30 | Understanding Power Pivot and Power BI data modelling principles, including table relationships, calculated measures, and filter behaviour
- 10:30-11:00 | Establishing financial KPIs covering revenue growth, gross margin, operating margin, return on investment, cost efficiency, and financial productivity
- 11:00-11:30 | Coffee break
- 11:30-12:00 | Applying financial analysis techniques to evaluate profitability by product, customer, department, business unit, and operating segment
- 12:00-13:00 | Using DAX concepts and analytical calculations to develop financial ratios, period comparisons, cumulative results, and performance measures
- 13:00-14:00 | Practical exercise: Building a financial performance model with revenue, expenditure, profitability, and departmental KPI calculations

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Day 3 - Budget Analytics, Forecasting and Financial Performance Evaluation

- 09:00-09:34 | Integrating budget, actual, and forecast data to establish consistent financial performance reporting structures
- 09:34-10:08 | Performing budget-versus-actual analysis using absolute variances, percentage variances, financial trends, and operational drivers
- 10:08-10:42 | Applying diagnostic analytics to investigate revenue shortfalls, expenditure increases, margin deterioration, and departmental performance differences
- 10:42-11:00 | Developing financial forecasting models using historical trends, business drivers, assumptions, and rolling forecast techniques
- 11:00-11:30 | Coffee break
- 11:30-12:19 | Developing financial forecasting models using historical trends, business drivers, assumptions, and rolling forecast techniques (continued)
- 12:19-12:53 | Applying sensitivity and scenario analysis to evaluate changes in sales, pricing, costs, inflation, and financial performance
- 12:53-14:00 | Practical workshop: Developing a financial planning and variance analysis model with forecast scenarios, performance indicators, and management explanations

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

- 09:00-09:30 | Analysing accounts receivable through ageing reports, collection trends, overdue balances, customer concentration, and days sales outstanding
- 09:30-10:00 | Evaluating accounts payable, supplier payment patterns, cash conversion cycles, and working capital efficiency
- 10:00-11:00 | Developing cash flow analytics to monitor liquidity movements, operating cash generation, payment commitments, and short-term funding requirements
- 11:00-11:30 | Coffee break
- 11:30-12:00 | Identifying unusual financial patterns and potential reporting exceptions through trend analysis, transaction comparisons, and exception indicators
- 12:00-13:00 | Designing interactive financial dashboards using Power BI or Excel with charts, KPI cards, slicers, filters, and financial performance summaries
- 13:00-14:00 | Dashboard workshop: Creating an interactive financial management dashboard covering profitability, working capital, budget performance, and liquidity indicators

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

- 09:00-10:00 | Developing automated financial reporting workflows using Power Query refresh processes, reusable data models, and standardised reporting templates
- 10:00-10:30 | Applying financial data governance principles covering data ownership, access permissions, confidentiality, validation, and reporting consistency
- 10:30-11:00 | Evaluating the practical use of predictive analytics and artificial intelligence in financial forecasting, anomaly identification, and management reporting
- 11:00-11:30 | Coffee break
- 11:30-12:00 | Evaluating the practical use of predictive analytics and artificial intelligence in financial forecasting, anomaly identification, and management reporting (continued)
- 12:00-12:30 | Communicating financial insights through executive dashboards, analytical commentary, visual storytelling, and decision-focused financial recommendations
- 12:30-13:00 | Establishing a financial business intelligence improvement roadmap covering technology, analytical capabilities, reporting processes, and performance measurement
- 13:00-14:00 | 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
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No seminar dates are currently available.