

aractech

Global Learning for Operational Leaders



ACCOUNTING AND FINANCE | AF-004

Power BI for Finance Professionals

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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.

Course Methodology

- 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

- 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
- Automate financial reporting processes
- Improve data-driven financial decision-making

Target Audience

- This course is suitable for:
- Financial Analysts and Finance Managers
- Accountants and Controllers

Course outline

Detailed course outline

Day-by-day outline for Power BI for Finance Professionals.

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

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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

- 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

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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
11 - 15 May 2026	Istanbul	Classroom	€1,995
8 - 12 June 2026	Rome	Classroom	€2,975
6 - 10 July 2026	Munich	Classroom	€2,415
10 - 14 August 2026	Amsterdam	Classroom	€2,975
14 - 18 September 2026	London	Classroom	€2,940
5 - 9 October 2026	Istanbul	Classroom	€1,995
16 - 20 November 2026	Vienna	Classroom	€2,975
Live online option		Online delivery is available at €1,250.	