

Power BI for Finance Professionals



Who Should Attend?

Accountants and Finance Professionals
Management Accountants
Finance Business Partners
Strategic Planning and Budgeting Team Members
Government Finance Function Members
Business and Investment Analysts



Dates: 24 – 26 June 2026

VENUE : Online

COST : USD595.00pp

REGISTER NOW

Switchboard: +27 (68 633 8497

Email: afriscience@afriscience.co.za

Attendance by two or more representatives of your organization will foster teamwork and enhance the program's impact

Course Introduction

This Power BI for Finance Professionals training course will highlight the potential benefits of Microsoft's powerful tool for data analysis, visualisation, reporting, and producing dashboards. In today's dynamic world of rapid change and disruption, the ability to effectively analyse data and present actionable insights is vital for driving informed decision-making and maintaining a competitive advantage. Power BI empowers finance professionals to harness the power of data analysis, visualisation, and reporting to transform raw data into meaningful insights and dynamic interactive dashboards.

This training course will explore how Power BI enables finance professionals to unlock the full potential of their financial data. From financial reporting and budgeting to forecasting and trend analysis, Power BI offers a comprehensive suite of features and functionalities tailored to the unique needs of finance departments. By taking advantage of its intuitive interface, robust data modeling capabilities, and interactive visualizations, finance professionals can streamline their workflow, automate repetitive tasks, and gain deeper insights into key financial metrics and alignment of resources with strategic objectives.

Training Objective

By the end of this Power BI for Finance Professionals training course, participants will have developed a set of practical skills and techniques that will enable them to:

- Use Power BI to analyse business data
- Generate informative financial presentations
- Use Power BI's powerful data analysis tools
- Design data visualisations with impact
- Create bespoke interactive performance dashboards
- Share meaningful business insights

Course Outline

Session 1

Getting Started with Power BI

- Power BI Service and Power BI desktop
- The basic elements of Power BI
- Key steps in producing a Power BI presentation
- How to acquire, clean, and transform data in Power BI
- Introducing the DAX modelling language
- The advantages of Power BI over Excel

Session 2

Getting The Best Out of Power BI

- Understanding the star schema system
- Optimising models with fact and dimension tables
- Understanding cardinality in Power BI
- Using power BI standard visuals
- Data analysis and modelling functions
- Drill, filter, and sort tools
- Layout and formatting tools

Session 3

Principles of Business Performance Management (BPM)

- Fundamentals of strategic and tactical planning
- Principles of business value
- Understanding business models
- Business Analytics (BA) and Business Intelligence (BI)
- Measuring and managing organisational performance
- A framework for Business Performance Management (BPM)
- Using Power BI to improve BA and BPM

Session 4

Data Visualisation and Effective Report Design

- Key elements of effective Power BI financial reports
- Avoiding common mistakes in financial reporting
- Integrating financial metrics and non-financial KPIs
- Transforming data into information and insights
- Creating compelling data visualisations
- Merging form and function for great Power BI rep

Session 5

Implementing Power BI Dashboards in Effective BPM

- Defining performance dashboards
- Strategic, tactical, and operational dashboards
- Using Power BI dashboards as "agents for change"
- The key dashboard applications
- Steps in developing effective Power BI dashboards
- Building interactive dashboards in Power BI

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ORGANIZATIONAL IMPACT

Implementing Power BI within the finance team can have a significant organizational impact, bringing about several benefits and changes across various aspects of the organization:

Improved the organization will gain from:

- Improved decision-making
- Higher efficiency and productivity
- Increased transparency and accountability
- Better collaboration and communication
- Enhanced strategic and performance management

PERSONAL IMPACT

This training course will personally benefit delegates by providing :

- An introduction to and working knowledge of Power BI
- Practical skills in data analysis and modelling in Power BI
- Increased effectiveness in communicating with decision-makers
- Principles of best design for data visualisations
- Tools and techniques for building interactive dashboards



"Empowering Excellence: Afriscience Training Programs, Where Learning Extends Beyond Courses to Forge Lasting Partnerships."

