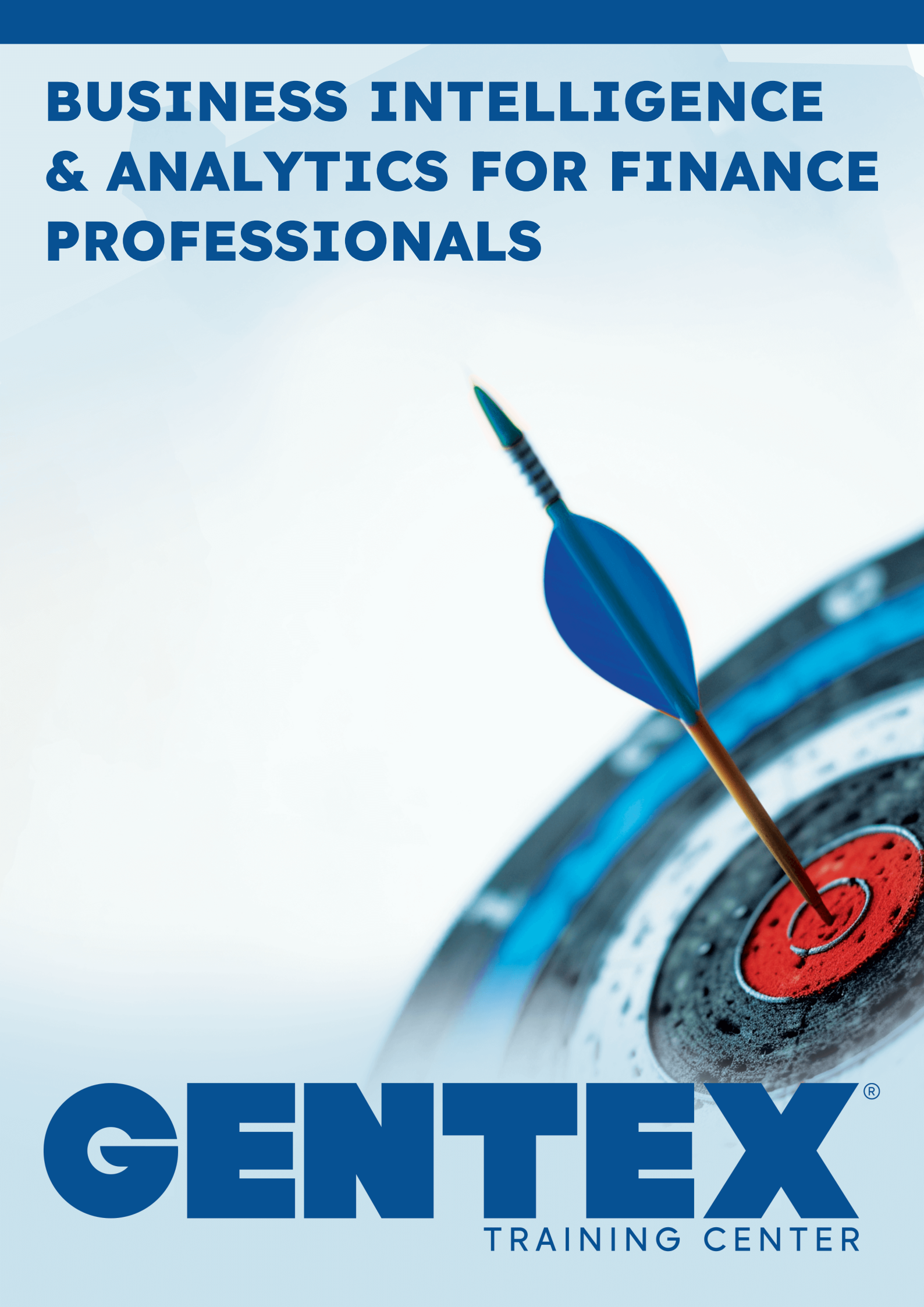
BUSINESS INTELLIGENCE & ANALYTICS FOR FINANCE PROFESSIONALS



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Introduction

Business Intelligence & Analytics for Finance Professionals Training Course builds the capability that turns financial data into decisions rather than reports. Finance teams now sit on transaction-level data from ERP systems, banking platforms, and operational tools, yet many still summarise it in static spreadsheets that arrive too late to change anything. Business intelligence changes that by connecting data, automating transformation, and presenting insight where decisions happen. This course builds that capability. It covers data modelling, visualisation, and dashboard design. Furthermore, it applies financial analysis, forecasting, and performance reporting. In addition, it develops data governance and insight communication. As a result, participants deliver analysis that executives act on.

Business Intelligence & Analytics for Finance Professionals Course Objectives

- Explain business intelligence concepts and their application in finance.
- Identify and connect financial data sources across systems.
- Build data models for analysis and reporting.
- Apply ETL and Power Query techniques to transform financial data.
- Design financial dashboards using Power BI or equivalent tools.
- Apply DAX or equivalent measures for financial calculations.
- Perform variance, trend, and driver-based financial analysis.
- Apply forecasting methods to financial planning data.
- Design performance indicators and executive reporting.
- Apply data governance, quality, and access control standards.

Course Methodology

- Interactive lectures with practical finance BI and analytics cases.

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- Data modelling and transformation workshops.
- Dashboard and visualisation construction exercises.
- Financial analysis and forecasting practice.
- Structured peer review with facilitator feedback on insight communication.

Who Should Take This Course

- Financial analysts and FP&A professionals.
- Management accountants and controllers.
- Business intelligence analysts supporting finance.
- Treasury and performance reporting staff.
- Finance managers building analytical capability.
- Internal auditors using data analytics.

Business Intelligence & Analytics for Finance Professionals Course Outlines

Day 1: Business Intelligence Foundations for Finance

- Business intelligence concepts and the analytics value chain.
- Descriptive, diagnostic, predictive, and prescriptive analytics.
- Financial data sources: ERP, banking, CRM, and operational systems.
- Data warehouse, data lake, and semantic model concepts.
- BI tool landscape and selection considerations.
- Business questions that drive BI design.
- Case study: defining a finance BI use case.

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Day 2: Data Modelling and Transformation

- Dimensional modelling and star schema design.
- Fact tables, dimension tables, and relationships.
- Data extraction and staging from source systems.
- Power Query transformations and data cleansing.
- Handling hierarchies, calendars, and reporting structures.
- Data refresh scheduling and automation.
- Workshop: building a finance data model.

Day 3: Visualisation and Dashboard Design

- Chart selection for financial data types.
- Dashboard layout, hierarchy, and visual clarity.
- Interactive filters, slicers, and drill-through design.
- DAX measures for financial calculations and ratios.
- Time intelligence for year-to-date and period comparisons.
- Exception highlighting and conditional formatting.
- Workshop: building an executive financial dashboard.

Day 4: Financial Analytics and Forecasting

- Variance analysis and driver decomposition.
- Trend, seasonality, and comparative analysis.
- Forecasting methods for revenue and cost planning.
- Scenario modelling and what-if analysis.
- Working capital and cash flow analytics.

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- Cost and profitability analysis by segment.
- Workshop: building a forecast and scenario model.

Day 5: Reporting, Governance, and Insight Delivery

- Performance indicator design and scorecards.
- Executive reporting packs and board dashboards.
- Insight communication: finding, evidence, implication, action.
- Data governance, quality standards, and ownership.
- Access control, security, and confidentiality.
- Automation and self-service analytics enablement.
- Course review, assessment, and action planning.

Conclusion

By successfully completing Business Intelligence & Analytics for Finance Professionals, participants will gain a thorough understanding of business intelligence foundations, data modelling and transformation, visualisation and dashboard design, financial analytics and forecasting, and reporting, governance and insight delivery. They will also acquire practical skills in financial data modelling and transformation, dashboard and visualisation design, financial analytics and forecasting, and reporting governance and insight communication. In addition, the course prepares them to turn financial data into decisions executives act on. Gentex Training Center delivers this programme with a strong focus on applied analytical practice and effective insight delivery.

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FAQs for Business Intelligence & Analytics for Finance Professionals course

Q1 What is the "Business Intelligence & Analytics for Finance Professionals" course about?

It is a five-day programme on turning financial data into decisions. It covers BI foundations, data modelling and transformation, dashboard and visualisation design, financial analytics and forecasting, and reporting governance and insight delivery.

Q2 What are the key benefits of the "Business Intelligence & Analytics for Finance Professionals" course?

Participants move finance reporting from static spreadsheets to live insight. The course shortens reporting cycles, improves data accuracy through modelling and automated refresh, sharpens variance and driver analysis, strengthens forecasting and scenario work, improves executive visibility, and reduces manual effort in recurring reporting.

Q3 What skills will I gain from the "Business Intelligence & Analytics for Finance Professionals" course?

Participants gain financial data modelling and transformation, dashboard and visualisation design, financial analytics and forecasting, and reporting governance and insight communication. These four skills cover the practical core of business intelligence and analytics in finance.

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Q4 What tools, methods, or standards are covered in the "Business Intelligence & Analytics for Finance Professionals" course?

The course covers descriptive, diagnostic, predictive and prescriptive analytics, financial data sources across ERP, banking, CRM and operational systems, data warehouse, data lake and semantic model concepts, BI tool selection, dimensional modelling and star schema design, fact and dimension table relationships, data extraction and staging, Power Query transformations and cleansing, hierarchy, calendar and reporting structure handling, refresh scheduling and automation, chart selection for financial data, dashboard layout and hierarchy design, slicers and drill-through design, DAX measures for financial calculations, time intelligence for year-to-date and period comparison, exception highlighting and conditional formatting, variance analysis and driver decomposition, trend and seasonality analysis, forecasting methods for revenue and cost, scenario modelling and what-if analysis, working capital and cash flow analytics, segment cost and profitability analysis, performance indicator and scorecard design, executive reporting pack construction, insight communication structuring, data governance and quality standards, access control and confidentiality, and automation and self-service analytics enablement.

Q5 How is the "Business Intelligence & Analytics for Finance Professionals" course applied in real-world practice?

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Participants apply the methods to their own financial data. They connect source systems, build dimensional models, transform and cleanse data, design dashboards with financial measures, run variance and driver analysis, build forecasts and scenarios, define performance indicators, and prepare executive reporting packs with clear narrative. Many leave with a finance data model, a dashboard template, and an executive reporting structure ready to use.