Faysal Aziz

Power BI for Strategic Finance

Transform your financial data into actionable insights in a day

FA-0360

Data & Analytics

Introduction

In the fast-paced world of tech, efficient financial operations are key to success. This course explores how Power BI empowers finance departments in large tech companies to streamline processes, optimize decision-making, and gain real-time visibility into critical financial health indicators.

Learning outcomes

Upon completion of this course, you will be able to:

- Build robust data models that align with the financial workflows of a tech company.
- Use DAX to perform calculations tailored to tech-specific financial metrics.
- Design dashboards that track key operational metrics across departments.
- Identify trends, anomalies, and areas for improvement within financial operations.
- Effectively communicate financial insights to stakeholders.

Prerequisites

- Strong working knowledge of Power BI desktop.
- Mastery of data modeling concepts (relationships, calculated columns, measures).
- Proficiency in DAX (Data Analysis Expressions)
- Basic understanding of financial operations concepts.

Training outline

1. Topic 1: Tailoring Data Models for Tech Finance

- Incorporating tech-specific data sources
- Building flexible data models to accommodate evolving business needs
- Optimizing for performance with large datasets

2. Topic 2: Essential DAX for Financial Operations

- KPI calculations (CAC, LTV, churn rate, burn rate)
- Budget vs. actual variance analysis
- Forecasting and scenario modeling
- Analyzing resource allocation and cost efficiency
- Calculating complex financial metrics across time periods (growth rates, variances)

3. Topic 3: Visualizing Operational Performance

- Dashboards for tracking revenue, expenses, and profitability across departments and projects
- Combining visualizations to highlight the interplay of volume, pricing, and revenue
- Visualizing resource utilization and bottlenecks
- Highlighting key trends in operational costs and efficiency
- Decomposition trees to break down revenue drivers
- Waterfall charts for visualizing performance changes
- Custom visuals for specialized analysis

4. Topic 4: Uncovering Improvement Opportunities

- Identifying areas for cost reduction or revenue growth
- Using drill-down and filtering to pinpoint operational inefficiencies
- Benchmarking performance against industry standards

This course is designed to provide you with the tools to transform financial operations within your company using Power BI. Your trainer, with their industry expertise, will customize examples and scenarios to address your unique challenges. Post training, you are encouraged to continue to explore and adapt Power BI's capabilities to drive data-driven decision-making within your organization!

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