



PB INSTITUTE OF RESEARCH AND TECHNOLOGY

P.O Box 21457-00100

Nairobi - Kenya

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Power BI Budget Analysis: Reporting Training

Duration: 5 days

On-Site

01 Who Should Attend

- Finance Directors and Finance Managers
- Chief Financial Officers (CFOs)
- Financial Planning & Analysis (FP&A) Professionals
- Budget Managers, Budget Officers, and Budget Analysts
- Financial Controllers
- Accountants and Management Accountants
- Treasury Managers and Treasury Officers
- Business Intelligence (BI) Analysts
- Data Analysts and Financial Data Specialists

02 About the Course

Organizations and professionals seeking to improve **budget reporting, financial analytics, visualization, and decision-making through Microsoft Power BI**. Participants will gain practical skills in transforming financial data into interactive dashboards, analyzing budget performance, monitoring variances, generating real-time reports, identifying financial trends, and communicating insights effectively to support strategic planning and resource management.



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03 Workshop Objectives

- Understand the benefits of using Power BI for budget analysis and financial reporting.
- Learn how to connect Power BI to various data sources containing budget and actual financial data.
- Master data transformation and cleaning techniques within Power BI using Power Query.
- Develop skills in building data models in Power BI optimized for budget analysis.
- Master the creation of dynamic and user-friendly Power BI dashboards for budget reporting.
- Understand how to perform drill-down analysis and explore underlying budget data within Power BI.
- Learn how to create calculated measures and columns in Power BI for advanced budget analysis.

04 Module Topics

Module 1: Introduction to Power BI for Financial Reporting

Module 2: Data Transformation and Cleaning with Power Query

Module 3: Building Data Models for Budget Analysis

Module 4: Creating Interactive Budget Visualizations

Module 5: Designing Dynamic Budget Dashboards

Module 6: Drill-Down Analysis and Data Exploration

Module 7: Calculated Measures and Columns for Advanced Analysis

Module 8: Comparing Actuals Against Budget Targets