Advanced Financial Modeling with Excel and Power BI Training Course

15 - 19 Jun 2026

Geneva

6200 € (Per Person)

Ref: #AF4248_529785

Course Introduction / Overview:

This intensive training course is designed to elevate your financial analysis capabilities by mastering the synergistic power of Excel and Power BI. In today's data-driven financial landscape, proficiency in building static financial models is no longer sufficient. The ability to create dynamic, interactive, and visually compelling reports is what separates leading financial professionals. This program moves beyond basic spreadsheet functions to immerse participants in the construction of robust, flexible financial models for valuation, forecasting, and complex scenario analysis. We will explore the foundational principles advocated by experts like Professor Aswath Damodaran, a leading authority in corporate finance and valuation, whose insights from works such as "The Little Book of Valuation" emphasize the importance of a strong narrative behind the numbers. At BIG BEN Training Center, we bridge this gap by teaching you not only how to build sophisticated three-statement and discounted cash flow (DCF) models in Excel but also how to transform that data into powerful, automated dashboards using Power BI. This integrated approach ensures you can perform granular analysis and communicate your findings effectively to stakeholders, enabling better strategic decision-making and transforming raw data into actionable financial intelligence.

Target Audience / This training course is suitable for:

- Financial Analysts.
- Corporate Finance Professionals.
- Investment Banking Analysts and Associates.
- Private Equity and Venture Capital Professionals.
- Equity Research Analysts.
- Financial Planners and Controllers.
- Business Consultants and Advisors.
- Portfolio Managers.
- Finance Managers and Directors.
- Anyone seeking to advance their skills in financial modeling and data visualization.

Target Sectors and Industries:

- Banking and Financial Services.
- Investment Management and Asset Management.
- Management Consulting.
- Corporate Sector (Public and Private Companies).
- Telecommunications and Technology.
- Real Estate and Construction.
- Oil and Gas.
- Governmental bodies and public sector finance departments.
- Healthcare and Pharmaceuticals.
- Retail and Consumer Goods.

Target Organizations Departments:

- Finance Department.
- Financial Planning and Analysis (FP&A).
- Treasury Department.
- Mergers and Acquisitions (M&A) and Corporate Development.
- Strategy and Business Planning.
- Investment and Portfolio Management.
- Risk Management.
- Accounting and Reporting.
- Internal Audit.
- Project Management Office (PMO).

Course Offerings:

By the end of this course, the participants will have able to:

- Build a fully integrated three-statement financial model from scratch in Excel.
- Develop robust discounted cash flow (DCF) and other valuation models.
- Implement advanced scenario and sensitivity analysis to assess risk and opportunity.
- Utilize Power Query to automate data cleaning and transformation processes.
- Create a relational data model within Power BI for complex financial analysis.
- Write advanced DAX (Data Analysis Expressions) formulas for custom financial calculations and KPIs.
- Design and build interactive, dynamic financial dashboards and reports in Power BI.
- Integrate Excel models with Power BI for real-time, automated reporting.
- Master data storytelling techniques to present financial insights effectively.
- Apply financial modeling best practices for accuracy, flexibility, and clarity.

Course Methodology:

The training methodology at BIG BEN Training Center is centered on immersive, hands-on learning to ensure participants gain practical, applicable skills. This course is not a theoretical lecture; it is an interactive workshop where participants will build complex financial models and dashboards from the ground up. Each session combines expert-led instruction on core concepts with intensive, real-world case studies and practical exercises. We believe in learning by doing, so participants will spend a significant portion of the course working directly within Excel and Power BI. The facilitator will guide the group through each step, encouraging active participation, questions, and collaborative problem-solving in small group activities. This approach fosters a deeper understanding of not just the "how" but also the "why" behind financial modeling and data visualization techniques. Continuous feedback and personalized guidance from the instructor ensure that every participant can overcome challenges and master the advanced functionalities of both platforms. The course is designed to simulate the demands of a modern finance role, preparing participants to immediately apply their new skills in their professional environment.

Course Agenda (Course Units):

Unit One: Foundations of Financial Modeling in Excel

- Fundamentals of financial modeling best practices.
- Building a historical three-statement model (Income Statement, Balance Sheet, Cash Flow).
- Understanding the circular references and iterative calculations.
- Forecasting drivers and assumptions for financial projections.
- Creating schedules for debt, depreciation, and working capital.
- Linking the three financial statements for a fully integrated model.
- Formatting models for clarity, flexibility, and user-friendliness.

Unit Two: Advanced Valuation and Scenario Analysis in Excel

- Introduction to valuation methodologies (DCF, Comps, Precedents).
- Building a detailed Discounted Cash Flow (DCF) valuation model.
- Calculating the Weighted Average Cost of Capital (WACC).
- Performing sensitivity analysis using data tables.
- Implementing dynamic scenario analysis with CHOOSE and OFFSET functions.
- Creating tornado charts to visualize key sensitivities.
- Introduction to LBO and M&A modeling concepts.

Unit Three: Introduction to Power BI for Financial Analysis

- Transitioning from Excel to Power BI for financial reporting.
- Introduction to the Power BI ecosystem (Desktop, Service, Mobile).
- Using Power Query to connect, clean, and transform financial data from various sources.
- Building a robust data model and creating relationships.
- Introduction to DAX (Data Analysis Expressions) for finance.
- Creating calculated columns and basic measures for financial KPIs.
- Developing foundational financial reports and visuals.

Unit Four: Advanced Data Modeling and DAX in Power BI

- Advanced DAX functions for time intelligence (YTD, QTD, MTD).
- Creating sophisticated measures for variance analysis (Budget vs. Actual).
- Implementing dynamic date tables for robust financial reporting.
- Understanding evaluation context and the CALCULATE function.
- Building KPI dashboards with gauges, cards, and conditional formatting.
- Using bookmarks and drill-through features for interactive analysis.
- Optimizing Power BI models for performance.

Unit Five: Integrating Excel and Power BI for Dynamic Reporting

- Strategies for connecting Excel models to Power BI.
- Automating the refresh of financial reports and dashboards.
- Building a comprehensive management dashboard combining operational and financial data.
- Advanced data visualization techniques for financial storytelling.
- Publishing reports to the Power BI Service for collaboration and sharing.
- Final capstone project: Building an integrated model in Excel and a corresponding dashboard in Power BI.
- Presenting financial insights and recommendations to stakeholders.

FAQ:

Qualifications required for registering to this course?

There are no requirements.

How long is each daily session, and what is the total number of training hours for the course?

This training course spans five days, with daily sessions ranging between 4 to 5 hours, including breaks and interactive activities, bringing the total duration to 20 - 25 training hours.

Something to think about:

In an era of increasing data complexity, how does the synergy between Excel's granular modeling and Power BI's visualization capabilities redefine the role of a financial analyst from a number-cruncher to a strategic storyteller?

What unique qualities does this course offer compared to other courses?

This course distinguishes itself by focusing on the powerful integration of Excel and Power BI, a combination essential for the modern financial professional. Unlike programs that teach these tools in isolation, our curriculum is built around the seamless workflow between them, mirroring real-world corporate finance and investment analysis environments. We move beyond theoretical lectures to a purely hands-on, case-study-based approach where participants build complex, fully integrated financial models and dynamic dashboards from scratch. The emphasis is not just on learning functions and formulas but on applying them to solve practical business problems, from valuation and M&A analysis to automated management reporting. Furthermore, the course is deeply rooted in financial storytelling, teaching participants how to transform complex data into clear, compelling narratives that drive strategic decisions. This dual mastery of granular modeling in Excel and high-impact visualization in Power BI equips participants with a holistic and highly sought-after skill set, preparing them to add immediate and significant value to their organizations.