Financial Business Intelligence and Data Analytics Training Course



19 - 23 Oct 2026

Geneva

5900 € (Per Person)

Ref: #BUI2678_81442

Course Introduction / Overview:

This course provides a comprehensive exploration of Business Intelligence (BI) and data analytics tailored specifically for the dynamic worlds of finance and accounting. In an era where data is the most valuable asset, finance professionals are transitioning from traditional reporting to becoming strategic partners who drive data-driven decision-making. This program is designed to bridge the gap between financial expertise and analytical proficiency, empowering participants to transform raw financial data into actionable strategic insights. Drawing on principles discussed by thought leaders like Thomas H. Davenport in his influential work "Competing on Analytics," the course emphasizes the practical application of BI tools and techniques to solve real-world financial challenges. Participants will learn to automate reporting, build interactive dashboards, and apply advanced analytics for forecasting and performance management. BIG BEN Training Center has meticulously crafted this curriculum to ensure that attendees not only understand the technology but also master the art of data storytelling, enabling them to communicate complex financial narratives effectively to stakeholders and influence key business outcomes. This journey will equip you with the skills to enhance financial performance, optimize processes, and solidify your role as a key contributor to your organization's strategic objectives.

Target Audience / This training course is suitable for:

- Financial Analysts.
- Accountants and Senior Accountants.
- Finance Managers and Controllers.
- Financial Planning and Analysis (FP&A) Professionals.
- Internal and External Auditors.
- Treasury and Risk Management Professionals.
- Chief Financial Officers (CFOs) and Finance Directors.
- Business Analysts working with financial data.
- IT professionals supporting finance departments.

Target Sectors and Industries:

- Banking and Financial Services.
- Insurance and Asset Management.
- Manufacturing and Supply Chain.
- Retail and Consumer Goods.
- Healthcare and Pharmaceuticals.
- Telecommunications and Technology.
- Governmental bodies and Public Sector organizations.
- Consulting and Professional Services.

Target Organizations Departments:

- Finance Department.
- Accounting Department.
- Financial Planning and Analysis (FP&A).
- Internal Audit and Compliance.
- Treasury Department.
- Strategic Planning.
- Investor Relations.
- Procurement and Cost Management.

Course Offerings:

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

- Develop a robust BI strategy tailored to the specific needs of a finance department.
- Integrate disparate financial data sources into a unified data warehouse for analysis.
- Design and build interactive financial dashboards and performance scorecards.
- Automate the generation of standard financial reports like P&L, balance sheets, and cash flow statements.
- Apply predictive analytics techniques for more accurate financial forecasting and budgeting.
- Conduct advanced profitability and variance analysis using BI tools.
- Master data visualization best practices to communicate financial insights effectively.
- Implement data governance principles to ensure financial data accuracy and security.
- Enhance corporate performance management through data-driven insights.
- Utilize what-if and scenario analysis to support strategic financial decisions.

Course Methodology:

The training methodology at BIG BEN Training Center is designed to be immersive, practical, and highly interactive, ensuring participants can immediately apply their learning in a professional context. We move beyond theoretical lectures by focusing on a hands-on approach grounded in real-world financial scenarios. The course heavily utilizes case studies from various industries, allowing participants to analyze complex financial datasets and develop BI solutions for authentic business problems. Interactive workshops and group exercises encourage collaborative problem-solving and the exchange of ideas among peers, fostering a dynamic learning environment. Participants will engage in practical sessions using sample data to build financial models, design performance dashboards, and run predictive analytics. Our expert instructors facilitate these sessions, providing personalized feedback and guiding participants through technical and strategic challenges. The methodology emphasizes a cycle of learning, application, and feedback, ensuring a deep and lasting understanding of how to leverage business intelligence to transform financial and accounting functions from operational reporting centers into strategic advisory partners within the organization.

Course Agenda (Course Units):

Unit One: Foundations of Business Intelligence in Finance

- Introduction to Business Intelligence and its strategic importance for finance.
- The evolution from traditional accounting to data-driven financial analysis.
- Understanding the BI ecosystem: Data Warehousing, ETL, and OLAP.
- Key financial metrics and KPIs for effective performance measurement.
- Aligning BI initiatives with corporate financial objectives.
- The role of the modern finance professional as a strategic data partner.
- Case study: Analyzing a successful BI implementation in a finance department.

Unit Two: Financial Data Management and Modeling

- Identifying and integrating key financial data sources (ERP, CRM, Excel).
- Principles of data warehousing for financial and accounting data.
- ETL (Extract, Transform, Load) processes for ensuring data quality and consistency.
- Building a robust financial data model for analytics.
- Data governance and stewardship in the finance function.
- Techniques for cleansing and preparing financial data for analysis.
- Introduction to SQL for financial data querying and manipulation.

Unit Three: Financial Reporting, Dashboards, and Visualization

- Principles of effective data visualization for financial information.
- Designing and developing interactive financial performance dashboards.
- Automating statutory and management financial reporting.
- Building key reports: P&L, Balance Sheet, and Cash Flow statements.
- Techniques for variance analysis and trend identification.
- Creating self-service BI reports for business users.
- Data storytelling: How to present financial data with impact and clarity.

Unit Four: Advanced Financial Analytics and Forecasting

- Introduction to predictive analytics for finance professionals.
- Time-series analysis for financial forecasting and budgeting.
- What-if and scenario modeling for strategic planning.
- Advanced profitability analysis by customer, product, and channel.
- Using BI for risk management and compliance monitoring.
- Driver-based planning and rolling forecasts.
- Introduction to machine learning concepts for fraud detection and credit scoring.

Unit Five: BI Strategy, Implementation, and Future Trends

- Developing a strategic roadmap for BI adoption in finance.
- Evaluating and selecting the right BI tools for your organization.
- Managing a BI project: from requirements gathering to deployment.
- Fostering a data-driven culture within the finance team and beyond.
- The role of cloud computing and AI in the future of financial analytics.
- Presenting BI project proposals and demonstrating ROI to senior management.
- Final project: Developing a complete BI solution for a given financial case study.

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:

How might the integration of predictive analytics into traditional accounting practices redefine the role of a financial controller from a historical record-keeper to a strategic business partner?

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

This course distinguishes itself by moving beyond generic tool-based training to offer a curriculum deeply rooted in the specific strategic context of finance and accounting. While many courses focus on the technical "how-to" of a particular software, our program emphasizes the "why" and "so what" behind the data. We concentrate on developing the participant's analytical mindset, enabling them to ask the right business questions and translate complex financial data into a compelling strategic narrative. The curriculum is built around real-world financial case studies, ensuring that every concept, from data modeling to predictive analytics, is directly applicable to the challenges faced by modern finance professionals. Furthermore, we place a significant emphasis on data storytelling and communication, a critical skill often overlooked, which empowers participants to influence executive decisions effectively. The course is designed not just to create proficient BI users, but to cultivate strategic financial partners who can drive performance, mitigate risk, and guide their organizations with data-backed confidence and foresight. It bridges the critical gap between technical data skills and strategic financial acumen.