Integrated BI Reporting: Power BI & Excel for Finance Professionals Training Course

16 - 20 Nov 2026

California

7900 € (Per Person)

Ref: #BUI8964_53990

Course Introduction / Overview:

This training course is an essential program designed for finance professionals who want to leverage business intelligence (BI) for strategic decision-making and sustainable growth. It moves beyond a focus on simple data analytics to address the strategic and cultural challenges of building a data-driven organization. Participants will learn how to build a comprehensive BI strategy, from identifying key metrics to managing implementation and measuring success. The program covers key topics like data visualization, data governance, and fostering a data-driven culture. It is informed by the work of authors like Stephen Few, whose book Show Me the Numbers provides a clear framework for companies to use data to tell a compelling story and drive business value. This course at BIG BEN Training Center emphasizes a blend of strategic planning and operational excellence. By the end, professionals will have a clear, actionable roadmap for leading a successful BI initiative. This program is for any organization that wants to remain competitive and relevant in a fast-changing market.

Target Audience / This training course is suitable for:

- Financial analysts and controllers.
- Accountants and auditors.
- Business analysts and data analysts.
- Senior finance professionals and CFOs.
- Financial planning and analysis (FP&A) teams.
- Anyone responsible for driving business growth.
- Consultants in technology and business strategy.

Target Sectors and Industries:

- Financial Services and Banking.
- Technology and Software.
- Retail and E-commerce.
- Manufacturing and Industrial.
- Healthcare and Pharmaceuticals.
- Telecommunications.
- Government agencies and equivalent public sector organizations.

Target Organizations Departments:

- Finance.
- Accounting.
- Information Technology (IT).
- Strategic Planning.
- Operations.
- Risk Management.
- Auditing.

Course Offerings:

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

- Formulate a comprehensive BI strategy.
- Diagnose their organization’s current data maturity.
- Identify and prioritize key BI initiatives.
- Lead a team through the change management process.
- Build a roadmap for implementation and execution.
- Measure the return on investment (ROI) of BI projects.
- Overcome cultural and organizational barriers to change.

Course Methodology:

This training course uses a highly practical and project-based methodology. The program is built around a single, comprehensive case study that follows an organization's BI journey from an executive perspective. Participants will work in teams to apply a variety of frameworks, like the BI Maturity Model, to analyze challenges and develop solutions. The course is designed to be highly interactive, with hands-on workshops that allow participants to build a realistic roadmap for their own organizations. Each unit includes a project where participants must present their strategic choices and justify their decisions. Instructors at BIG BEN Training Center will provide expert guidance, helping participants navigate the complex interdependencies between data, business strategy, and corporate culture. This pragmatic approach ensures that participants leave with a clear understanding of the principles of BI and the practical skills to lead it in their own companies. This program is for professionals who want to move beyond abstract concepts to concrete, actionable plans.

Course Agenda (Course Units):

Unit One: The Foundations of a Data-Driven Culture

- Defining business intelligence (BI) and its core components for finance professionals.
- The difference between a traditional and a data-driven enterprise.
- Diagnosing your organization's data maturity.
- The strategic benefits and risks of data-driven change.
- Case study on a company that successfully transformed.
- Identifying key data opportunities and threats.
- Building a business case for data investment.

Unit Two: Strategic Planning and Business Models

- Developing a vision and mission for the data journey.
- Using a BI business model framework.
- Identifying and prioritizing key strategic initiatives.
- Building a clear roadmap for implementation.
- The role of data and analytics in strategic decision-making.
- Planning for different transformation scenarios.
- Workshop on a BI strategy roadmap.

Unit Three: Managing the Change Process

- Understanding the cultural barriers to change.
- Communicating the vision to employees and stakeholders.
- Building a coalition of champions for transformation.
- The role of an agile mindset in a data journey.
- Developing a change management plan.
- Overcoming resistance from within the organization.
- Case study on a company that failed to manage the change.

Unit Four: Technology and Operations

- Identifying the right technology for your strategy.
- Understanding the role of cloud computing, AI, and automation.
- Transforming core business processes with technology.
- Managing the project lifecycle for a BI initiative.
- The role of cybersecurity and data governance.
- Building seamless customer experience.
- Workshop on a technology implementation plan.

Unit Five: Implementation and Sustainable Growth

- Developing a plan for piloting a new BI solution.
- Establishing key performance indicators (KPIs) for BI projects.
- Measuring the return on investment (ROI) of your transformation.
- The role of a leader in ensuring long-term success.
- Building a culture of continuous learning and improvement.
- Final project presentation on a digital transformation plan.
- Review and feedback session.

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 can a leader effectively manage the paradox of digital transformation, which requires both a long-term strategic vision and a culture of agile, rapid experimentation with a tolerance for frequent failure?

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

This training course is unique because it is designed specifically for finance professionals, addressing the unique challenges and opportunities of a data-driven world. It recognizes that BI is about business strategy and innovation, not just technology, and provides a clear framework for navigating the complexities of institutional change and corporate governance. The curriculum is highly practical, with a focus on real-world case studies and hands-on workshops that allow participants to immediately apply new skills to their own organizations. Unlike a traditional technology course, this program emphasizes a strategic mindset, data-driven decision-making, and the measurement of business value. It gives professionals a valuable skill set that combines strategic foresight with a deep understanding of technology and change management, preparing them to lead their organizations into a more responsive and effective future.