

# Financial Planning & Budgeting in Power BI

**Training Course** Financial Planning & Budgeting in Power BI

**Course Language** Bilingual - English Material with English / Arabic Delivery

**Course Duration** Total Number of hours: 15

- Course Objectives**
- Develop interactive budgeting and planning dashboards using Power BI.
  - Integrate actual, budget, and forecast data into unified reporting views.
  - Perform variance analysis, trend tracking, and scenario simulation.
  - Support strategic planning with visual, real-time financial insights.

Course Key Topic Area Includes:

- Course Content**
- Principles of Financial Planning and Budgeting
  - Preparing and Structuring Budget Data for Analysis
  - Importing and Merging Actual vs. Budget Data in Power BI
  - Designing Budget Dashboards and Forecast Views
  - Applying Variance and Trend Analysis Techniques
  - Scenario Planning Using What-If Parameters
  - Automating Budget Reporting and Performance Reviews

At the end of the program the trainees will be able to:

- Learning Outcomes**
- Convert Excel-based planning models into Power BI dashboards.
  - Visualize financial plans and forecasts alongside actual performance.
  - Perform detailed variance and trend analysis using dynamic tools.
  - Deliver insightful, board-level budget reports and visual updates.

## Target Audience

- Financial planning and analysis (FP&A) professionals
- Budget officers and finance managers
- Controllers and business analysts
- Government and private sector finance professionals involved in budgeting and planning

## Course Material /Technology used/ Details Relevant to the course.

- **Technology Used:** Power BI Desktop (latest version), Excel (budget and forecast templates)
- **Materials Provided:** Sample budget models, dashboard templates, case study exercises
- **Delivery Mode:** Hands-on, instructor-led workshop with practical business scenarios