
Power BI Finance Dashboards and Variance Reporting Training Course

18 – 22 October 2027
Madrid





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Programme Summary

Power BI finance dashboards and variance reporting is a one-week training course for finance managers at advanced level, culminating in a published finance performance report set for their own organisation. Finance teams are expected to explain results faster and in more depth, yet many still spend the month-end assembling numbers rather than interpreting them. The programme builds a governed Power BI model on ledger and planning data, then uses it for budget-versus-actual, profitability and cash analysis presented to a consistent notation standard. Mars Training Centre UK delivers this programme in Power BI finance dashboards and variance reporting.

The Business Case

Boards and executive committees want to know not only what happened but why, and what finance expects next. When variance commentary depends on manual extracts, explanations arrive late and differ between business units. A shared finance model with defined measures lets controllers and business partners answer follow-up questions in the meeting, compare units on the same basis and spend their time on recommendations.

- Month-End Insight Lead Time: Shortens as refreshed dashboards replace manually compiled variance packs.
- Consistency of Management Information: Improves when every unit reports from one set of governed financial measures.
- Margin and Cash Decisions: Sharpen when profitability by product and customer and working-capital trends are visible together.

Principles and Evidence Base

- IBCS Version 1.2 International Business Communication Standards: Apply the SUCCESS rules to variance charts, scenario notation and report layout in Sessions 3 and 4.
- Variance Analysis Decomposition: Separates price, volume and mix effects behind budget-versus-actual movements in Session 3.
- Dimensional Modelling: Structures ledger facts against account, cost centre, entity and calendar dimensions in Session 1.
- Least-Privilege Access Principle: Guides row-level security and report distribution for sensitive financial data in Session 4.



Intended Participants

- Leads accountable for monthly and quarterly performance reporting to executive committees.
- Planning and analysis managers who own budgets, forecasts and variance commentary.
- Controllers responsible for the integrity of management information across entities.
- Finance partners who advise operational leaders on margin, cost and cash.

The programme serves corporate finance functions in manufacturing, retail, energy and public sector bodies.

Learning Outcomes

1. Participants will be able to construct a Power BI finance model linking ledger, budget and forecast data to a chart of accounts hierarchy.
2. Participants will be able to formulate DAX measures for income statement, balance sheet and cash indicators.
3. Participants will be able to analyse budget-versus-actual variances into price, volume and mix effects.
4. Participants will be able to evaluate profitability by product, customer and channel using margin waterfall views.
5. Participants will be able to design finance dashboards that follow IBCS notation and secure data by role.
6. Participants will be able to present a variance narrative that supports an executive decision.

Programme Structure

Day 1: Finance Data Model in Power BI

How should ledger and planning data be organised for reliable finance reporting?

- Connecting ERP Trial Balance and General Ledger Extracts
- Chart of Accounts Hierarchies and Sign Conventions
- Cost Centre, Entity and Fiscal Calendar Dimensions
- Combining Actuals, Budget and Forecast Scenarios
- Currency Translation and Intercompany Considerations

Day 2: DAX for Financial Statements

How are financial statements and ratios calculated once and reused everywhere?

- Income Statement Measures and Subtotal Logic
- Balance Sheet Closing Balances and Period Movements
- Indirect Cash Flow and Working-Capital Measures
- Financial Ratios and Rolling Twelve-Month Views
- Measure Documentation and Naming Standards



Day 3: Power BI Variance Reporting and Profitability

What explains the gap between plan and actual, and where is margin earned?

- Budget-Versus-Actual and Forecast Accuracy Tracking
- Price, Volume and Mix Variance Decomposition
- Product, Customer and Channel Profitability Analysis
- Margin Waterfall and Bridge Visuals
- IBCS Scenario Notation for Plan, Actual and Forecast

Day 4: Finance Dashboards, Security and Governance

How are finance dashboards designed, protected and kept trustworthy?

- Executive Finance Dashboard Layout and SUCCESS Rules
- Cash and Working-Capital Monitoring Pages
- Row-Level Security by Entity and Cost Centre
- Workspaces, Certified Datasets and Refresh Schedules
- Reconciliation of Dashboards to the Ledger

Day 5: Applying Power BI Finance Dashboards

How do the techniques combine into a report set that leaders will use?

- Building a Participant Variance Page From the Shared Model
- Applying Security Roles to a Multi-Entity Scenario
- Drafting Variance Commentary for an Executive Committee
- Peer Review Against IBCS Notation
- Finance Performance Report Set Presentation

Methodology

The programme is run as a data workshop in Power BI Desktop and the Power BI service. Participants work on anonymised multi-entity ledgers and plans drawn from manufacturing and retail groups, then adapt each page to the structure of their own organisation. Facilitators review models, measures and commentary in turn, so that every dashboard reconciles to the ledger before it is styled.

- Suggested activity: Explaining a gross margin shortfall through price, volume and mix bridges.
- Suggested activity: Restricting a regional controller's view with row-level security.
- Suggested activity: Rewriting a cluttered variance chart to IBCS notation.



Capstone Output

Each participant completes a finance performance report set. It includes a documented finance data model, a library of tested financial measures, budget-versus-actual and profitability pages, a cash and working-capital page, security roles and a written variance narrative. It is used as the template for the next monthly executive pack.

Frequently Asked Questions

Is Power BI finance dashboards and variance reporting suitable for finance managers new to Power BI?

Yes, provided you are confident with financial statements and spreadsheets. It moves quickly from Power BI basics to advanced finance modelling, so prior exposure to Power BI is helpful but not required.

Which standards underpin Power BI finance dashboards and variance reporting in this programme?

It rests on IBCS Version 1.2 and its SUCCESS rules for report notation, price, volume and mix variance decomposition, dimensional modelling and the least-privilege access principle.

How is the Power BI finance performance report set used at work?

You use it as the template for the monthly executive pack, refreshing actuals and forecasts each period and extending the shared model to further entities and reports.

How does Power BI variance reporting differ from a budgeting and forecasting programme?

It concentrates on modelling, analysing and presenting finance data in Power BI, whereas budgeting programmes focus on planning methods, targets and the forecasting process itself.