

MANAGING DATA FOR FINANCE WITH MICROSOFT POWER QUERY

“Harness the Power of Data to Make Informed Financial Decisions”

Schedule

Date	Venue	Fees (Face-to-Face)
12 – 16 Apr 2026	Online	USD 1500 per delegate

► Available delivery methods: Face-to-Face & Online Training

Introduction

In today's fast-paced financial environment, the ability to quickly analyze and manage large volumes of data is critical for making informed decisions. Microsoft Power Query is a powerful tool that simplifies data extraction, transformation, and loading (ETL), enabling finance professionals to streamline their processes and gain deeper insights. This 5-day course is designed to teach finance professionals how to effectively use Power Query to manage and manipulate data for financial analysis, reporting, and decision-making.

Through hands-on exercises and expert guidance, participants will learn how to use Power Query to clean, transform, and analyze data, ultimately improving the accuracy and efficiency of financial reports and analysis. This online training will equip participants with the skills necessary to automate and optimize their data workflows, saving valuable time and resources.

Objectives

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

- Understand the fundamentals of data management and the role of Power Query in financial analysis.
- Use Power Query to extract, transform, and load (ETL) data from various sources.
- Clean and reshape financial data to ensure accuracy and consistency.
- Build automated data workflows for more efficient financial reporting and analysis.
- Integrate Power Query with Excel to create dynamic and interactive financial models.

Why Attend

- Gain hands-on experience with Microsoft Power Query for financial data management.
- Learn how to automate data workflows to improve efficiency in financial reporting and analysis.
- Improve the accuracy of financial data by mastering data cleaning and transformation techniques.
- Discover best practices for integrating Power Query with Excel to streamline your financial models.
- Enhance your ability to make informed financial decisions by managing and analyzing data more effectively.

Target Audience

This program is designed for:

- Financial analysts
- Accountants and auditors
- Finance managers and decision-makers
- Data analysts working with financial data
- Professionals looking to improve their skills in managing and analyzing data for finance

Individual Benefits

Key competencies that will be developed include:

- Proficiency in using Microsoft Power Query to clean, transform, and analyze financial data.
- Ability to build automated data workflows for financial analysis and reporting.
- Enhanced skills in data modeling and integration with Excel.
- Improved accuracy in financial reporting through effective data transformation techniques.
- Time-saving techniques for managing large datasets and financial models.

Organizational Benefits

Upon completing the training course, participants will demonstrate:

- Increased efficiency in financial data management and reporting.
- Ability to automate and streamline data processes, reducing manual work.
- Enhanced accuracy and consistency in financial reports and analysis.
- Capability to integrate financial data from multiple sources for more comprehensive analysis.
- Improved decision-making through more efficient data handling and analysis.

Instructional Methodology

The course follows a blended learning approach combining theory with practice:

- Strategy Briefings - In-depth discussions on data management principles and the role of Power Query in finance.
- Case Studies - Real-world examples of Power Query applied to financial data management and reporting.
- Workshops - Hands-on exercises using Power Query to transform and analyze financial data.
- Peer Exchange - Group discussions on challenges and best practices in using Power Query for financial data.
- Tools - Introduction to advanced Power Query techniques for financial data management.

MAWA EVENTS

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Course Outline

Training Hours: 7:30 AM – 3:30 PM Daily Format: 3–4 Learning Modules | Coffee breaks: 09:30 & 11:15 | Lunch Buffet: 01:00 – 02:00

Day 1: Introduction to Power Query for Finance

- Module 1: Understanding Data Management in Finance (07:30 – 09:30)
- Overview of financial data management principles
- Key concepts in data transformation, ETL, and data workflows
- Introduction to Microsoft Power Query and its role in financial analysis
- Module 2: Getting Started with Power Query (09:45 – 11:15)
- Connecting to different data sources (Excel, databases, web data, etc.)
- Basic Power Query functions for data import and transformation
- Introduction to the Power Query interface and navigation

Day 2: Cleaning and Transforming Financial Data

- Module 1: Data Cleaning and Preparation (07:30 – 09:30)
- Techniques for cleaning raw financial data (removing duplicates, handling errors, etc.)
- Standardizing data formats and structures for analysis
- Transforming data to match the required format for reporting
- Module 2: Merging and Appending Data (09:45 – 11:15)
- Merging multiple datasets for comprehensive financial analysis
- Appending data from different sources into a single dataset
- Handling complex joins and relationships between datasets

Day 3: Advanced Power Query Techniques

- Module 1: Advanced Data Transformation in Power Query (07:30 – 09:30)
- Using advanced Power Query functions for complex data transformations
- Creating custom columns and applying formulas for financial calculations
- Working with dates, time, and financial periods in Power Query
- Module 2: Automating Data Workflows with Power Query (09:45 – 11:15)
- Automating the data refresh process for up-to-date financial reports
- Creating reusable Power Query queries for routine financial tasks
- Streamlining data integration for dynamic financial models

Day 4: Power Query and Excel Integration

- Module 1: Building Financial Models with Power Query and Excel (07:30 – 09:30)
- Integrating Power Query data with Excel for advanced financial modeling
- Building dynamic financial reports and dashboards
- Using Power Query in conjunction with Excel formulas and functions
- Module 2: Data Visualization and Reporting with Power Query (09:45 – 11:15)
- Creating charts and visualizations from transformed data
- Reporting techniques for financial analysis and KPI tracking
- Using Power Query for data aggregation and summarization

Day 5: Best Practices and Real-World Applications

- Module 1: Power Query Best Practices (07:30 – 09:30)
- Best practices for maintaining and optimizing Power Query queries
- Ensuring data quality and consistency in financial reports
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Troubleshooting and resolving common issues in Power Query

- Module 2: Real-World Applications in Financial Analysis (09:45 – 11:15)
- Applying Power Query to real-world financial scenarios and case studies
- Integrating financial data from multiple sources for analysis and decision-making
- Final Q&A and review of key takeaways for effective data management in finance

Certification

Upon completing the training course, participants will receive a Certificate of Completion in Managing Data for Finance with Microsoft Power Query, validating their expertise in using Power Query for efficient financial data management and reporting.

Why Choose MAWA Events

- **Global Expertise:** More than 17 years of experience in professional training and consulting.
- **Industry-Leading Faculty:** Courses delivered by seasoned professionals with hands-on experience.
- **Practical Insights:** Learn to turn theory into actionable strategies for real-world business impact.
- **Client-Focused Solutions:** Customized programs designed to achieve your organisation's unique goals.

In-House / Customized Training

Interested in running this course for your team?

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