



Advanced Finance Analytics: Engineered for Impact

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COURSE LENGTH

Two 2-Hour Virtual Sessions or
One Full Day In-Person

DESCRIPTION

This hands-on course empowers finance professionals to build the data, process and modeling backbone needed for high-impact analytics and AI readiness. Participants will learn to design scalable finance data models, streamline data preparation and apply responsible GenAI techniques to accelerate and not replace finance workflows.

The course includes interactive labs and executive-ready deliverables such as automated analysis, code notebooks and action plans. Participants will leave with reusable tools and frameworks to apply immediately in their roles. Prerequisites for this course include intermediate experience with Excel or business intelligence tools. While Python exposure is optional, participants will benefit from demonstrations of Natural Language coding techniques during the sessions. Upon completion, learners will walk away with reusable approaches to create finance data models (including both a diagram and data dictionary), Master Data alignment and “fast-path” checklists designed to streamline the onboarding of new finance datasets.

LEARNING OBJECTIVES

- Design finance-ready data models and master data for holistic analysis and reuse.
- Implement lean data prep (profiling, cleansing, joining, versioning) to reduce cycle time and rework.
- Select enabling technologies and process patterns for seamless data flow from capture to decision.
- Use GenAI responsibly to enhance finance analytics with governance and auditability.

AGENDA

Foundations & Modeling

- Strategic foundations for finance analytics
 - The value of data
 - Asking the right business questions
 - Bias traps to avoid
- Operating system for finance data
 - FAIR principles
 - Storage patterns
 - Scalable modeling for FP&A

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- Master Data Management and Data Governance
 - Entity, product/SKU, chart of accounts, customer, cost center
 - Alignment, usage and governance in analytics
- **Interactive Lab:** Define MDM for a consolidation scenario

Data Prep & Change Management

- Lean data prep at scale with Natural Language coding
 - Profiling → cleansing → joins → enrichment → pre-calcs → versioning
 - Hands-on with finance datasets
- Process & change management
 - ADKAR-aligned adoption
 - Roles and incentives in finance teams
- **Interactive Lab A:** Build a finance data model + MD alignment for OpEx/CapEx reporting
- **Interactive Lab B:** Cleanse and enrich period-over-period P&L data for faster close commentary