

KOENIG SOLUTIONS · COURSE OUTLINE

Financial Modeling & Power BI For Financial Analyst

Learn to build linked financial models, value businesses, automate Excel workflows and create Power BI dashboards for financial reporting.

7 Days

8 HOURS A DAY

14

MODULES

42

TOPICS

13

HANDS-ON ACTIVITIES

COURSE OVERVIEW

This course covers the foundations of financial modeling, including model structure, assumptions and Excel techniques for accuracy and efficiency. It progresses through forecasting, statistical and simulation tools, business valuation methods and fully linked three-statement model integration. It then addresses automation of model components with Excel functions and macros, followed by model auditing, stress testing and documentation practices. The final modules apply Power BI to connect financial models, build DAX-driven KPIs and time intelligence, and design financial dashboards, closing with industry case studies on IPO and M&A modeling.

WHO THIS COURSE IS FOR

Financial Analysts

Investment Analysts

Corporate Finance Professionals

Business Valuation Analysts

FP&A Professionals

Financial Reporting Analysts

LEARNING OBJECTIVES

By the end of the program, participants will be able to:

- Build professional-grade, fully linked financial models
- Perform business valuation using DCF & market multiples
- Automate model components for faster decision-making
- Use Power BI to create executive dashboards & financial insights
- Conduct model audits, stress tests, and scenario analyses

14 Modules, 42 Topics

DAY 1 Financial Modeling Foundations & Best Practices

01

Introduction to Financial Modeling

TOPICS

- Purpose & types of financial models
- Structuring models for clarity and transparency
- Building assumptions that drive projections
- **Best practices:** linking outputs to inputs correctly

02

Excel for Analysts - Efficiency & Accuracy

2 Hands-On Implementations**TOPICS**

- Analyst productivity shortcuts
- Data validation, scenario switches & version control
- **Lookup mastery:** XLOOKUP, INDEX-MATCH
- Error-proofing techniques (IFERROR, OFFSET, AGGREGATE)

DAY 2 Advanced Financial Modeling with Excel

03

Forecasting Techniques

TOPICS

- Revenue, COGS & OPEX forecasting frameworks
- Seasonality & growth assumptions
- Working capital modeling for cashflow accuracy

04**2 Hands-On Implementations**

Statistical & Simulation Tools

TOPICS

- Variance and sensitivity modeling
- Goal Seek and Scenario Manager automation
- Monte Carlo simulations (risk-driven projections)
- Introduction to Option Pricing (Black-Scholes concept)

DAY 3

Financial Modeling Mastery (Valuation Focus)

05

Business Valuation Techniques

TOPICS

- Equity vs enterprise valuation logic
- WACC & Beta calculation
- Terminal value (Gordon Growth & Exit Multiple)
- Comparable multiples analysis

06**2 Hands-On Implementations**

3-Statement Model Integration

TOPICS

- Fully linked P&L, Balance Sheet, Cash Flow model
- Debt & interest schedule
- Circularity, error tracking, iterative formulas

DAY 4

Programming for Financial Modeling (Automation Focus)

07

Financial Automation in Excel

TOPICS

Dynamic forecasting functions · Introduction to Macros (VBA optional) · Button-driven reporting automation

08**2 Hands-On Implementations**

Custom Logic & Audit Techniques

TOPICS

Model stress testing & error management · Financial model documentation & governance

09

Power BI Setup & Data Modeling

TOPICS

- Connecting Excel models to Power BI
- ETL using Power Query - Data cleansing & transformation
- Star schema modeling for finance

10

2 Hands-On Implementations

DAX Fundamentals for Finance

TOPICS

- Calculated Columns vs Measures
- Financial KPIs (Margins, ROI, EPS, Net Profit %, ROA)

11

Advanced DAX & Time Intelligence

TOPICS

YoY, QoQ metrics & variance analysis · Rolling forecasts & trend analysis

12

2 Hands-On Implementations

Financial Dashboard Engineering

TOPICS

- Cashflow & profitability visuals
- Scenario-based reporting for CXO decision-making
- Publishing dashboards with Row-Level Security (RLS)

13

Industry Case Studies

TOPICS

- **IPO Model:** Valuation & investor return metrics
- **M&A Model:** Accretion/dilution, synergies & deal analysis

14

Capstone Activity

Advanced Model Audit & Optimization

TOPICS

Error detection tools · Performance optimization · Documentation standards for handover

HANDS-ON ACTIVITIES

Practise What You Learn

#	MODULE	ACTIVITY
02	Excel for Analysts - Efficiency & Accuracy	HANDS-ON IMPLEMENTATION ■ Build Assumption + Drivers sheet ■ Create business logic-driven scenarios
04	Statistical & Simulation Tools	HANDS-ON IMPLEMENTATION ■ Forecasting module + sensitivity automation ■ Monte Carlo simulation for valuation ranges
06	3-Statement Model Integration	HANDS-ON IMPLEMENTATION ■ Build an integrated 3-statement model ■ Valuation dashboards inside Excel
08	Custom Logic & Audit Techniques	HANDS-ON IMPLEMENTATION ■ Create automated valuation output generator ■ Build audit checklist & validation rules
10	DAX Fundamentals for Finance	HANDS-ON IMPLEMENTATION ■ Connect financial model to Power BI ■ Create KPI Scorecard using DAX
12	Financial Dashboard Engineering	HANDS-ON IMPLEMENTATION ■ Create CFO Financial Dashboard ■ Build Board-ready insight reports
14	Advanced Model Audit & Optimization	Capstone Activity: Capstone Project - Final Submission (Optional)

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

Ready to Get Started?

Talk to a learning advisor about schedules, group training and customised delivery.

Visit koenig-solutions.com

✉ info@koenig-solutions.com