



**BPP**



Grant Thornton

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Coaches and Tutors  
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Industry



45 Years as a  
Leading Educator

# Data Foundations for Finance Professionals



Improved trust in  
Financial metrics  
across the organisation



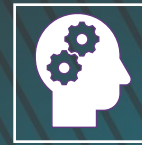
Increased confidence  
presenting data to  
other departments



More strategic  
conversations with the  
business



Improved profiling and  
talent management  
strategies



Enhanced problem-  
solving capabilities for  
participants



Elevated innovation in  
Financial practices; a  
forward-thinking  
departmental culture



Increased employee  
engagement by  
supporting  
development in digital  
and data skills

# Data Foundations for Finance Professionals

In the modern organisation, using financial data to drive decisions is essential to remain competitive. Finance teams play a critical role in interpreting this data to shape strategies, identify opportunities, and mitigate risks.



# Who is it for?

People in Finance functions working with data who are currently using spreadsheets, and who are spending a great deal of time generating manual reports and analyses.

Colleagues interested in **improving their technical literacy** and learning how to make **better decisions using data**.

# Programme Curriculum

In today's rapidly changing workplace, data-driven decision-making has become more important than ever.

In the modern organisation, using data to drive decisions is essential to remain competitive. Finance professionals play a critical role in interpreting this data to shape strategies, identify opportunities and mitigate risks.

Learn how to perform statistical analysis to gain insights that can inform strategic decision-making. This course will arm you with the tools needed to navigate the complex landscape of data-driven financial planning.

The BPP and Grant Thornton partnership brings together the strength of BPP's heritage of 45 years as a leading education provider, and Grant Thornton's recognised status as one of the world's leading professional organisations of independent advisory. Our blended experience and expertise has resulted in the creation of data programmes that combine the technical skills requirements of data analytics with extensive real world business insight.

This levy-funded introductory data analytics programme has been designed to equip finance professionals with the knowledge and skills needed to take advantage of the vast amount of data available.

The programme is highly practical and introduces the use of low-code, no-code data analytics tools. This means it is suitable to learners at all levels of the company who want to learn how to use data and analytics regardless of their technical acumen, empowering everyone to become confident data workers. Low-code, no-code are intuitive drag and drop tools that eliminate the need for traditional developers who write code.

During this programme, participants will become proficient with Microsoft Excel data analytics features and functionality, as well as PowerBI enabling them to be able to produce powerful, interactive and engaging insights.

We cover three core topics:

- **How to enhance decision-making with data**
- **Unlocking data analysis skills**
- **Mastering the art of data storytelling**

# Programme Curriculum

**The course is centred around three finance-theme based case studies and optional finance related webinars in addition to the core content.**

By the end of this course, participants will have gained the skills and knowledge to become a confident and proficient finance data analysts. They will be able to confidently harness the power of data to deliver meaningful insights and help an organization make informed and evidence-based financial decisions.

Additional content brought to you by Grant Thornton is focused on finance related case studies, specialist webinars and the following modules:

- Introduction to Business Partnering
- Commercial Fundamentals
- Identifying Needs
- Identifying Insights
- Effective Communication
- Effective Engineering

The finance related case studies will allow participants to apply what has been learned to relatable real-world scenarios. The case studies will cover:

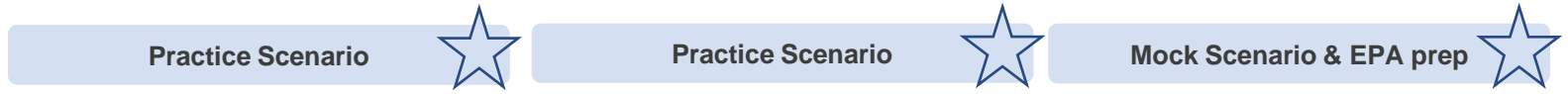
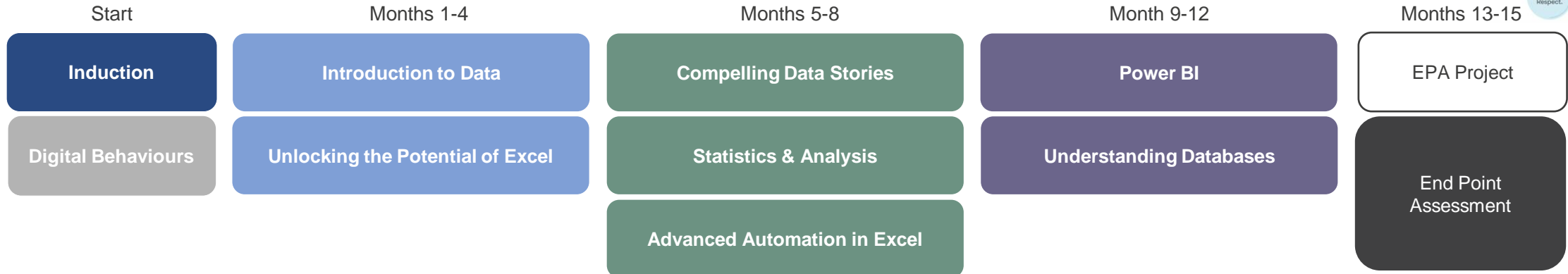
- using data to create strategic key performance indicators
- budgeting and planning
- interactive reporting dashboards

Grant Thornton finance business consulting experts will deliver optional webinars covering:

- Analysing financial and non-financial data to explore the benefits of using a blend of data in your organisation and how it connects to the organisation's strategy.
- Data driven planning - Working within an ever-changing macro environment, the importance of understanding the organisation's performance drivers and how to use data to improve the quality of forecasts and budgets.
- Insight and the art of the possible - The process of turning data into insight to drive action, how data quality affects conclusions, and how to communicate meaningful insight with impact.

# Level 3 - Data Foundations

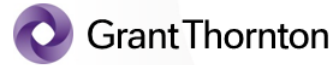
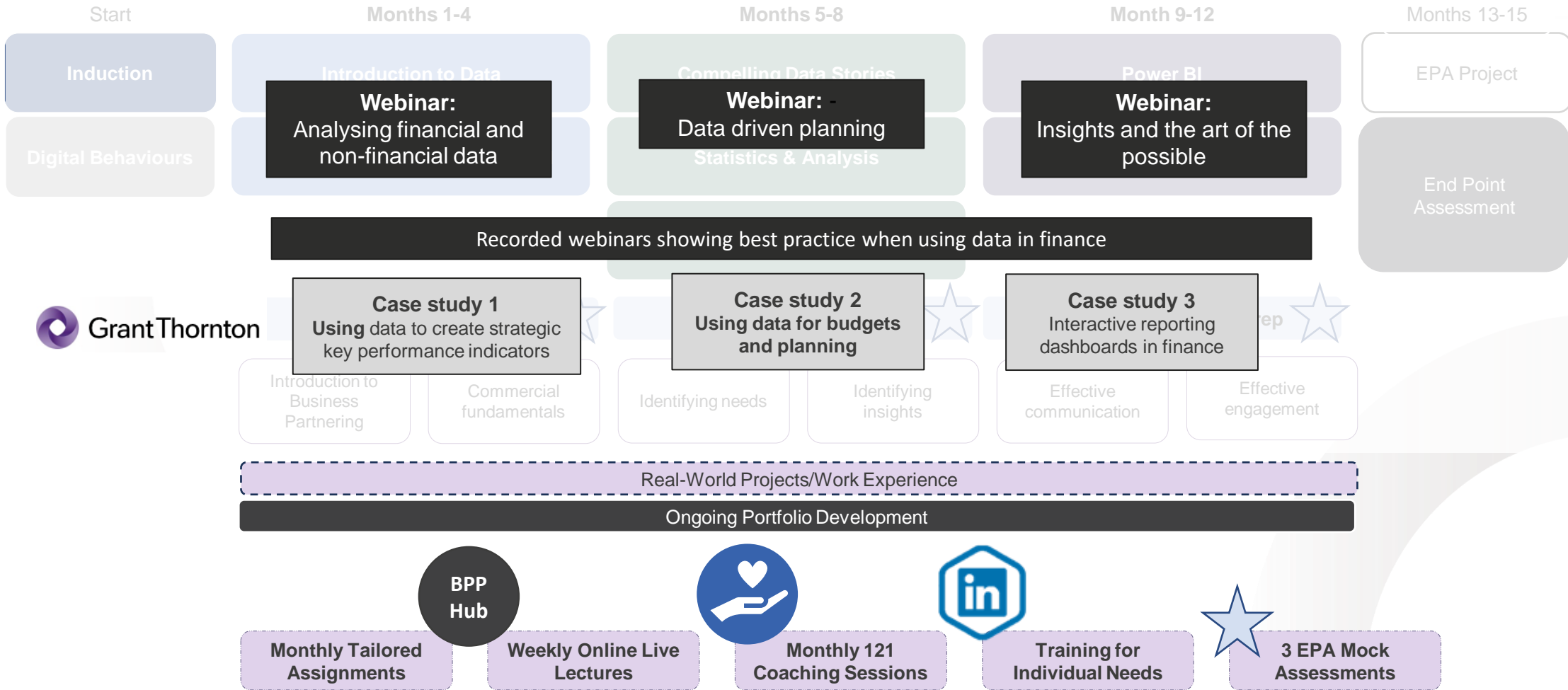
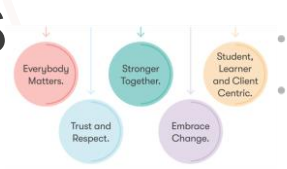
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\*Open Schedule Quarterly Intakes  
\*Closed Cohorts at Client Request



# Level 3 - Data Foundations for Finance Professionals



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# What you will Learn

## An Introduction to Data

This module introduces the basics of working with data - including the many different formats data can take, privacy and security concerns, and the various tools used by businesses to store, manage, and analyse data.

- An introduction to structured and unstructured data
- Data privacy, security and ethics
- Internal research skills
- Data and analytics tools

## Unlocking the Potential of Excel

Make everyday data handling tasks easier by accessing untapped potential in Excel. Learn techniques to seamlessly integrate data from various sources, clean it and refine it. Master pivot tables and harness the power of Toolpak to uncover powerful insights.

- Handling data in Excel
- Blending data
- Pivot tables
- Data cleaning
- Formatting and templates
- Analysing data: introduction to Toolpak and statistics

## Compelling Data Stories

Develop techniques to create compelling visuals that effortlessly illuminate trends, patterns, and outliers. Understand the role of dashboards and reporting and learn how to weave a powerful narrative around your data, captivating your audience and boosting your impact within your organisation.

- Basic charts: creation and design
- Pivot charts
- Principles of chart design: knowing your message, and using the right chart for your story
- Gathering requirements and dashboard design
- Data storytelling

## Statistics & Analysis

Build on foundational knowledge of Excel and harness more sophisticated features to interpret complex data like a pro, deriving actionable insights for a smarter, data-driven approach to business.

- Advanced Excel formulas and functions for data analysis
- Connecting to external data sources
- Data distributions
- Using the Analyse Data tool to produce histograms, correlations, and scatter plots
- How to interpret biased data

# What you will Learn

## Advanced Automation in Excel

Automate manual processes and find efficiencies in a data management context. Delve into advanced features designed to help construct data models and craft stunning dashboards, which can be maintained effectively.

- Automation using Macros and VBA
- Excel tables and forms
- Build a data model with Power Query
- Automate data processing using Power Query
- Advanced Power Query skills: DAX, normalisation, fuzzy matching
- Using Excel to build dashboards

## Power BI

Dive into the capabilities of Power BI and explore the software's dynamic capabilities. Discover how it empowers users across an organisation to transform raw data into captivating, actionable insights.

- Introduction to Power BI: features, capabilities and navigation
- Chart types in Power BI
- Data preparation with Power Query, metrics and scorecards
- Engaging your audience with interactivity
- DAX and an introduction to programming languages

## Understanding Databases

Build a foundational understanding of data storage, empowering you to hold more informed conversations with data specialists across your organisation.

Understand where data comes from, how it's stored, and why it matters. Explore the advantages, disadvantages, and associated risks of various approaches to data management.

- Sourcing data
- Data modelling and normalisation
- Database systems: warehouses, types of databases, and relational databases
- Introduction to SQL

# Benefits for the business

- **Improved decision-making leading to better overall business outcomes:** Teams will make more informed decisions based on insights derived from data, leading to better overall business outcomes.
- **More robust financial planning** - by showing how to frame questions answerable by data, this course equips learners to conduct more comprehensive and strategic planning.
- **Enhanced collaboration** setting budgets: improved data skills in finance departments supports improved cooperation and mutual understanding in budgeting processes across departments.
- **Ability to influence stakeholders** with data-driven story telling.
- **Automating** and improving the quality of day-to-day reporting and analysis delivering a greater impact and increased productivity.
- Enables colleagues to do more strategic jobs that require **strategic thinking**.
- **Accelerate** careers by delivering a tangible impact.
- **Strengthened operational resilience:** by providing the tools to accurately interpret data, this course supports robust operations that can better withstand market fluctuations.



## Contact us

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