Hitachi Solutions

Turn Customer Data into Information You Can Act On

Power BI Advanced Training for Financial Services Organizations

📅 **2 Days**

$ **Pricing Varies**

You've charted a course toward your customer-centric desired state, but you aren't there just yet. To help get you where you want to go on your customer experience journey, Hitachi Solutions is helping financial services organizations accelerate their customer experience strategies.

Why Act?

Competition is fierce. And today's customers are demanding exceptional interactions every time, no matter the channel. You need to be more responsive, agile, and innovative to keep them happy. Data is key to understanding customer behavior and identifying opportunities to improve the overall customer experience.

Our two-day workshop is designed to help you unlock valuable data assets - leveraging the data you already have gaining valuable customer insights - enabling cloud-scale reporting and analytics with Microsoft Power BI. With Power BI dashboards that give you centralized access to all your customer activities you'll glean intelligence and insights into their behaviors and expectations so you can deliver personalized, proactive, predictive experiences regardless of communication channel, business unit, or employee persona.

Day 1: Intro to Power BI

Importing Data

- Working with Data Sources
- Transforming Data (Power Query)
- Loading the Data Model
- Exercise: Import & Transform

Desktop Modeling

- Adding Calculations and Measures
- Implementing Time-Based Analysis
- Creating a User-Friendly Model
- Exercise: Creating A Data Model

Creating Reports

- Creating Basic visuals
- Adding Filtering, Tables and Matrix
- Controlling Visual Interactions
- Exercise: Creating a Basic Report

Publish

- Publishing a Report
- Creating a Dashboard
- Scheduling Data Refresh
- Exercise: Creating a Dashboard

Day 2: Advanced Power BI

Collaboration and Deployment

- App Workspaces
- Development Lifecycle
- Security Overview
- Content Packs
- Licensing Options

Report and Dashboard Creation

- Identifying Data Sources
- Plan the Data Model
- Import and Shape the Data
- Create the Data Model
- Create the Report
- Deploy the Report
- Create the Dashboard

Outcome & Deliverables

Following this hands-on training workshop, you will have a focused understanding of how you can report on your existing data and use insight gained to deliver personalized experiences to your customers.

Why Hitachi Solutions?

We are Hitachi Solutions — a global Microsoft solutions integrator passionate about delivering business transformation that embraces your people, processes, business applications, and technologies. Our #1 goal is to be your trusted, go-to partner for data and business system modernization and drive outcome-based value throughout your entire organization.

Get in Touch!

Ready to get started? Contact us today to take the next step in your journey.