

Decision-Making with Financial Dashboards and Storytelling

COURSE OVERVIEW

This practical course empowers professionals to transform complex financial data into clear, actionable insights through dynamic dashboards and compelling storytelling techniques. Participants will learn to design intuitive financial dashboards using tools like Power BI and Tableau, master data visualization best practices, and craft persuasive narratives that drive strategic decisions, bridging the gap between data analysis and executive communication. Through interactive exercises, the course develops both technical dashboard-building skills and the soft skills needed to influence participants with financial insights.

WHO SHOULD ATTEND?

This course is designed for financial analysts, FP&A professionals, and business intelligence specialists who need to present financial data more effectively, as well as managers, consultants, and executives who consume dashboards for decision-making. It equally benefits entrepreneurs seeking to communicate financial performance to investors, accountants transitioning to analytical roles, and digital transformation leaders implementing data visualization tools, making it ideal for any professional who needs to turn numbers into strategic narratives.

COURSE OUTCOMES

Delegates will gain the skills and knowledge to:

- Design user-centric dashboards that highlight key financial metrics
- Apply data visualization principles to improve financial communication
- Automate financial reporting with interactive dashboard tools
- Structure compelling data stories for different audiences
- Identify and eliminate common data visualization pitfalls
- Tailor financial presentations to executive decision-making styles
- Use storytelling techniques to drive action from financial insights

KEY COURSE HIGHLIGHTS

At the end of the course, you will understand;

- How to select the right KPIs for different dashboard audiences
- When to use specific chart types for optimal financial communication
- Why certain dashboard designs fail to drive decisions
- How to sequence financial insights into persuasive narratives
- What distinguishes good dashboards from great ones
- How to balance detail with clarity in financial visuals
- Why storytelling matters as much as data accuracy

All our courses are dual-certificate courses. At the end of the training, the delegates will receive two certificates.

1. A GTC end-of-course certificate
2. Continuing Professional Development (CPD) Certificate of completion with earned credits awarded