FP&A Executive Dashboard

Financial Planning & Analysis using SQL, Excel & Power BI

Project Overview

This project simulates the workflow of a real-world **Financial Planning & Analysis (FP&A)** function.

It tracks and analyzes financial metrics — **Revenue, Expenses, Headcount, Budget, and Profitability** — to generate actionable insights that support data-driven decision-making.

The project was designed to demonstrate the **complete data-to-decision pipeline**, starting from raw data extraction to visual performance dashboards.

© Objectives

- Build a data-driven financial reporting system that mirrors FP&A team workflows.
- Analyze **budget vs actuals**, profitability trends, and division performance.
- Apply SQL for data cleaning and aggregation, Excel for validation, and Power BI for visualization and forecasting.
- Present findings through an executive-style dashboard that enables strategic insights.

Tools & Technologies

Tool Role in Project

SQL (BigQuery) Data modeling, joins, aggregation, and variance analysis

Excel Data validation, quality checks, and transformation

Power BI Dashboard visualization, KPIs, and revenue forecasting

Data Sources

Synthetic datasets were created to simulate real corporate financial data:

Revenue.csv — Monthly revenue by division

- Expenses.csv Division-wise operating and non-operating expenses
- **Headcount.csv** Workforce data including average salary and total headcount
- **Budget.csv** Planned budget data for each division

These datasets were structured and related via **Division**, **Month**, and **Year** fields.

Analytical Process

1 Data Structuring (SQL)

- Created normalized tables for revenue, expenses, headcount, and budgets.
- Used SQL joins to integrate data and calculate KPIs:
 - Total & average revenue/expenses
 - Budget variance and variance %
 - o Profitability by division

Data Validation (Excel)

- Cleaned and standardized numeric formats, dates, and divisions.
- Performed guick checks to confirm SQL outputs matched raw data.

Dashboard Visualization (Power BI)

- Designed a clean, interactive **Executive Dashboard** featuring:
 - KPI Cards: Revenue, Profit, Variance %, Expense Ratio
 - o Charts: Actual vs Budget, Profit Margin by Division
 - o **Forecasting:** 6-month revenue projection
 - o Filters: Year and Division-based slicers for dynamic analysis

Key Insights

- FY24 revenue increased by 3% YoY, exceeding the annual budget by 38%.
- Overall profit improved by 5%, driven by cost control and margin expansion.
- SaaS & Services divisions contributed approximately 69% of total profit.
- Forecasts indicate steady revenue growth into FY25.

* Deliverables

Component Description

Datasets Folder 4 clean CSV files (Revenue, Expenses, Headcount, Budget)

SQL_Queries Folder 5 SQL scripts covering data modelling, analysis, and KPIs

Excel_Files Folder Validated datasets prepared for Power BI

Dashboard Folder Power BI (.pbix), PDF summary, and screenshot

Documentation Folder Project Summary (this file)

Learning Outcomes

- Strengthened understanding of FP&A workflows variance analysis, headcount efficiency, and margin tracking.
- Enhanced data storytelling and visualization design through Power BI.
- Learned to integrate **SQL**, **Excel**, **and BI tools** into one analytics framework.
- Developed hands-on experience with financial forecasting and performance reporting.

Links

GitHub Repository: github.com/ashishnetha/FPnA-Executive-Dashboard

LinkedIn Project Post: FPA_001

Email: ashish.gummadi9@gmail.com

Summary

This project represents a **practical**, **end-to-end FP&A** case study built from scratch — integrating financial analytics, visualization, and forecasting to support better business decision-making.