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WEBINAR: CREATE AWESOME DASHBOARD IN POWER BI & EXPLORING COVID-19 GALLERY

Date: Sunday, 19th April 2020 | 2 HOURS

Trainer & Mentor: **RAHIM ZULFIQAR ALI**

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RAHIM ZULFIQAR ALI

- Certified Analytics and Data Specialist (DigitalMarketer)

- Microsoft Innovative Educator Expert at Microsoft Education

- Certified Microsoft Global Challenger

- Microsoft Certified Trainer **(MCT)** 2016 till present.

- Microsoft Office Specialist Expert & Master Excel 2013 & 2016 (MSOM)

- **Founder & CEO** (EXCEL BASEMENT PRIVATE LIMITED)

- 7+ years of experience as Corporate Trainer for Excel & 4 years for **POWER BI.**

- Community Leader for **Tableau**

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My Contribution - Article

http://ibp.org.pk/quarterly-journal/

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Business Intelligence in Banking (Apr-Jun 2019)

Analytics using Microsoft POWER BI for Banking Sector (Jan-Mar 2020)

Emerging procurement technology: data analytics and cognitive analytics (Apr 2020) – Supply Chain

http://ibp.org.pk/wp-content/uploads/2019/08/journal-april-june-2019.pdf

BUSINESS INTELLIGENCE

BUSINESS INTELLIGENCE *IN BANKING*

By: Rahim Zulfiqar Ali

Business Intelligence (BI), in a nutshell, includes the applications, infrastructure, tools and best practices that enable access to data and analysis of information to expand and enhance decisions and performance. Business Intelligence is a process which involves data warehousing, data mining, reporting and querying capabilities, data analytics, interactive digital dashboards & data and process visualizations.

Top 5 Benefits of BI Use in Banking System:

- Feed as much data as you want into BI software, it will never get overloaded as long as it is good, clean data.
- Faster reporting – Banking BI allows organizations to visualize both historical and current data in real time. This makes spotting patterns, potential bottlenecks and setting goals easier based on historic metrics. No more waiting for a report for two months after you requested it from finance.
- Business intelligence in banking connects across disparate systems, removing the need to generate reporting from each one individually.
- Business intelligence in banking allows organizations to measure big data on their customers in quantities never seen before to help increase customer satisfaction. Banks can have a deeper understanding of their customers with banking BI, allowing them to address concerns proactively.
- More accurate reporting – business intelligence in banking removes the need to manually wrangle data by plugging directly into core systems databases.

BI in banking evolved through manual systems to management information systems with computerization. Banks had efficient transaction recording systems before computerization also. The manual systems too had effectively provided the necessary reports for management and regulatory requirements. These reports were manually consolidated at lower offices and final reports were presented at head office level. These manual systems worked well as long as the scale of operations of the banks was small.

As the banks grew in size and expanded geographically the number of branch network grew by leaps and bounds and so the volume of transactions became quite large and manual operations became time consuming, burdensome and error prone. To cater to the load of operations from all bank branches spread across the country, banks had started using computers and slowly banks have become fully automated.

The manual management information system (MIS) in the banks had the following drawbacks:

- The data was layered in different silos
- There was a time lag in data collating
- Data quality was poor
- Unavailability of customer specific data
- Data granularity required for developing analytics (what if scenario, drill down)
- Timely non- availability of data to the decision makers
- Reporting activity competed with business activity for resources at the branch
- Data classification rules were not applied uniformly across the organization and also varied with time

Slowly, majority of the banks began using information technology for MIS. The inflexibility of COBOL programs and batch processing was soon overcome by powerful desktop systems with rudimentary database systems, which allowed banks to analyze data, once it has been received in manual form from the branches, the same was transcribed into machine readable formats and validated. Quite a few of regulatory reports were also produced in this way. These earlier initiatives laid the foundation stone of BI in banking.

Uses of BI in Banking

Banks can analyze their historical performance over time to be able to plan for the future. The key performance indicators include deposits, credit, profit, income, expenses; number of accounts, branches, employees etc. Figures and growth rates (both in absolute and percentage terms) are required for this analysis. In addition to time dimension, which requires a granularity of years, half year, quarter, month and week; other critical dimensions are those of control structure (areas, regions, branches), geography (countries, states, districts, towns), area (rural, semi-urban, urban, metro) and products (savings and current accounts, loans, overdrafts, cash credit). Income could be broken down in mark-up, treasury and other income; while various break-ups for expenses are also possible. Other possible dimensions are customer types or segments. Derived indicators such as profitability, business per employee, product profitability etc. are also evaluated over time. The existence of a number of business-critical dimensions over which the same transaction data could be analyzed, makes this a fit case for multi-dimensional databases (hyper cube or 'the cube').

Business Intelligence & Analytics for Banking Sector

Banks desire to use customer-related data on products, channel activities and profitability to improve the targeting of online campaigns and make business processes more seamless and effective.

By using a Business Intelligence (BI) solution to analyze organizational data, banks can improve and streamline operational efficiencies, increase product sales and marketing strategies and better develop customer service programs.

Following are the key points:

1. Increase in customer base
2. Increase in operational efficiency
3. Increase in customer satisfaction level
4. Customer behavior analysis
5. Adherence to guidelines
6. Staff performance analysis
7. Increase in profitability

"By using a (BI) solution to analyze organizational data, banks can improve and streamline operational efficiencies, increase product sales and marketing strategies and better develop customer service programs."

http://ibp.org.pk/wp-content/uploads/2020/03/jan-march-2020.pdf

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CLEAN & AUTOMATE | ANALYZE | VISUALIZE

QUERY | PIVOT | BI

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1 CLEAN

Consolidating + cleaning messy data, making it ready for analysis
Using Power Query

2 ANALYSE

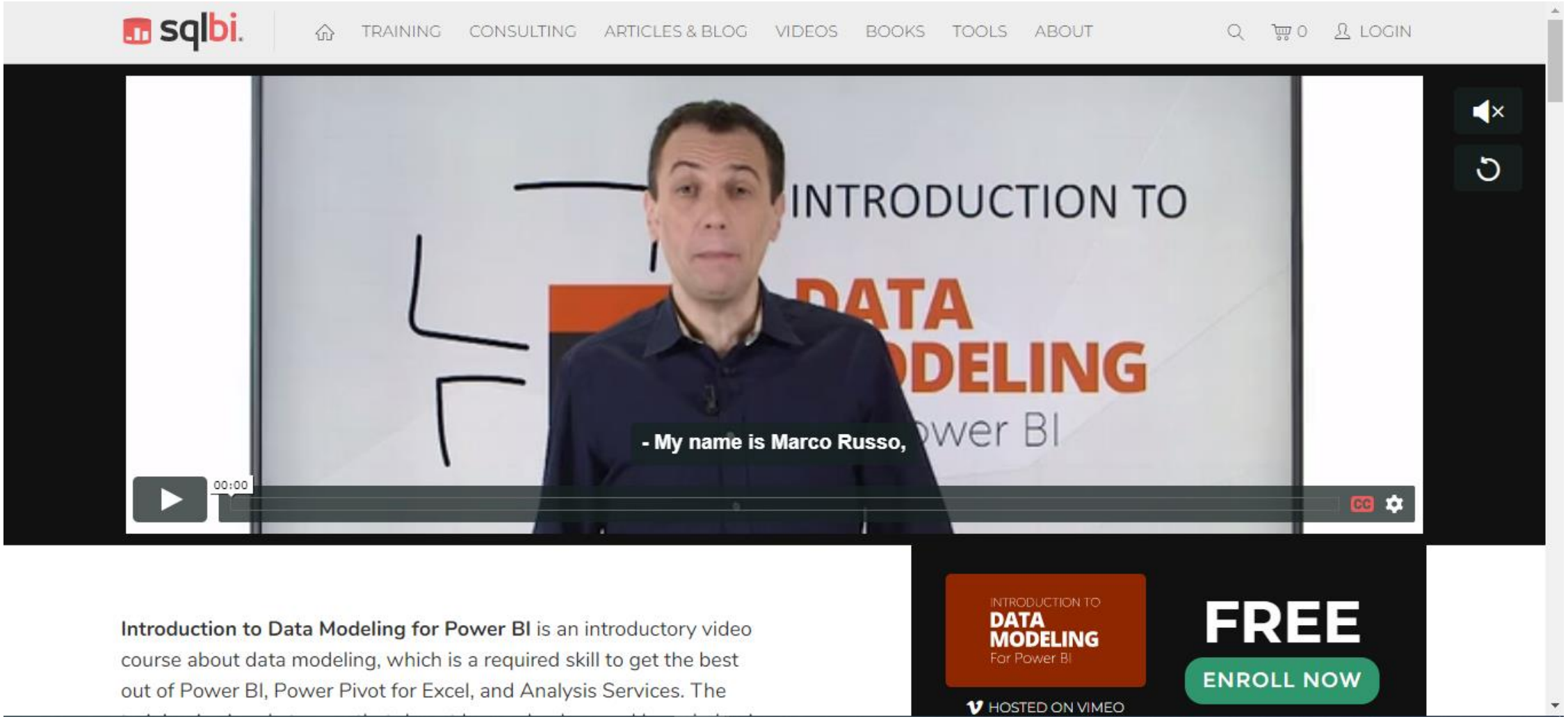
Powerful analysis that is nearly impossible using old excel
Using Power Pivot

3 VISUALIZE

Creating stunning & interactive visualizations
Using Power View & Power BI

SOLUTIONS | TRAINING | SUPPORT

https://www.sqlbi.com/p/introduction-to-data-modeling-for-power-bi-video-course/



http://portal.enterprisedna.co/p/ultimate-beginners-guide-to-dax

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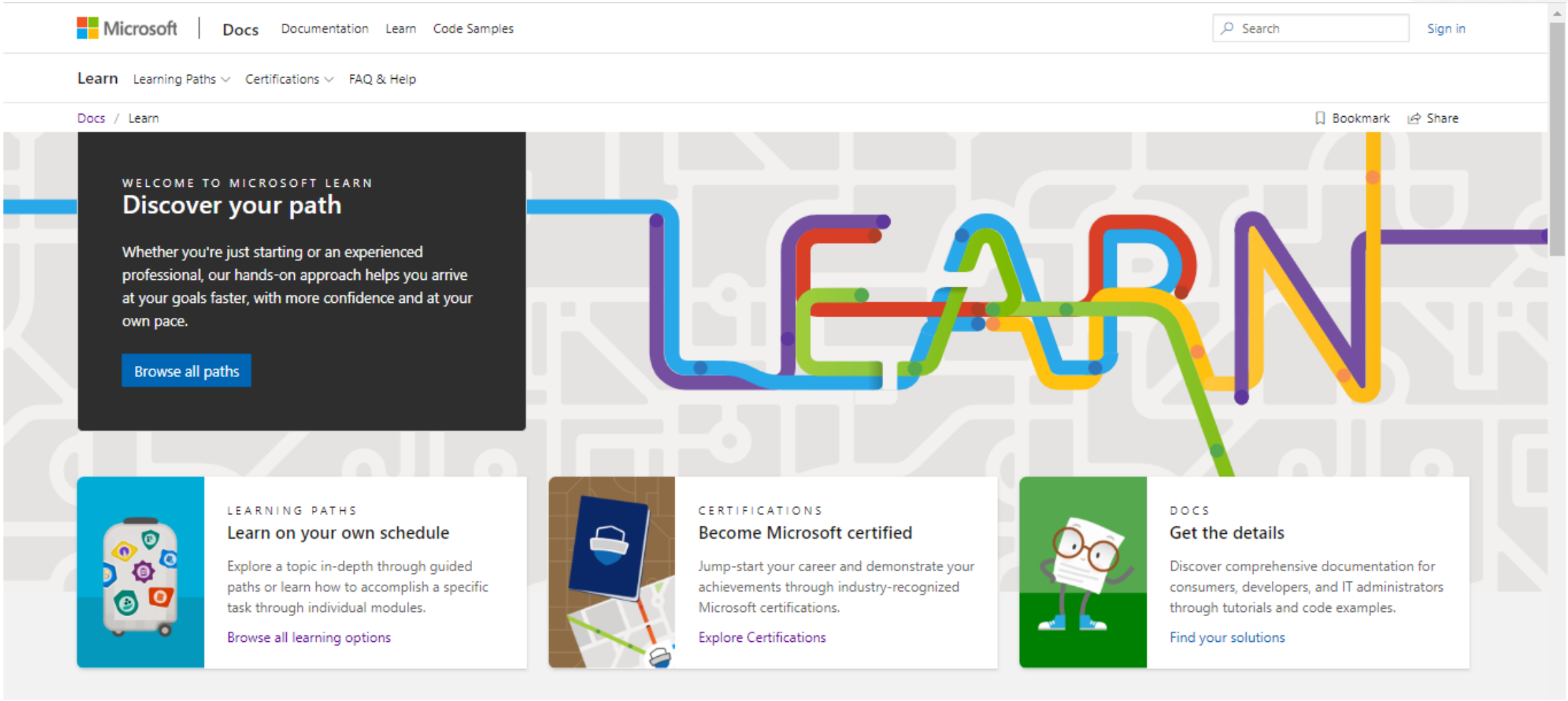
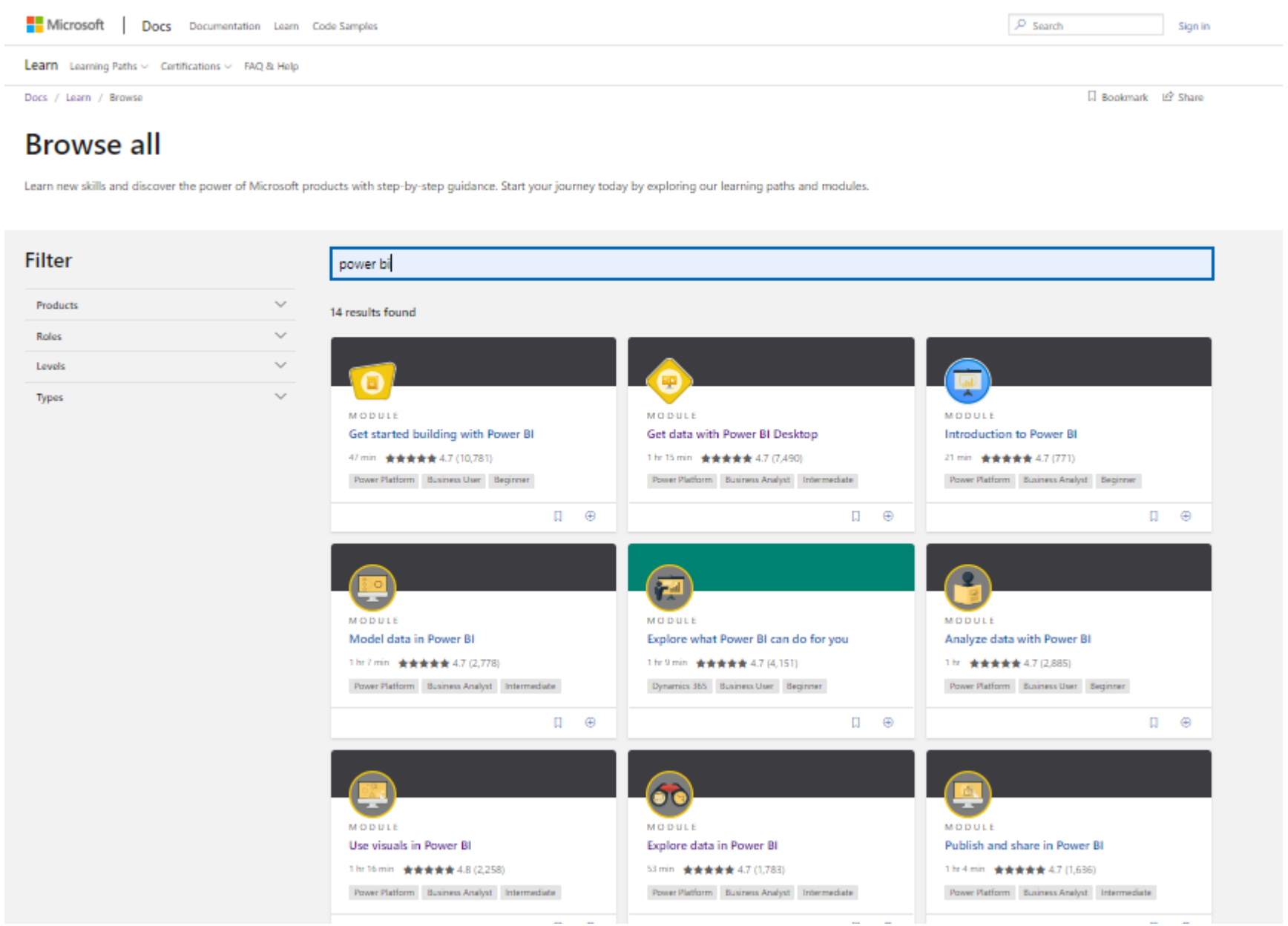
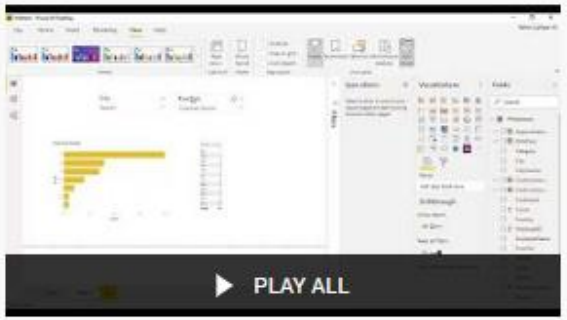
https://docs.microsoft.com/en-us/learn/







Power BI with Rahim Zulfiqar Ali

40 videos • 1,647 views • Last updated on 5 Feb 2020

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SUBSCRIBED

1 

Sync Slicers in POWER BI
Excel Basement Pvt Ltd

2 

Conditional Formatting in POWER BI (Less Than Only, Between & Greater Than Only)
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3 

Countries Flag Images Slicer in POWER BI
Excel Basement Pvt Ltd

4 

Filter based on specific criteria in POWER BI - Urdu / Hindi (Example of Blank Comments & Chart)
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5 

Year To Date (YTD) and Year To Growth (YTG) DAX in POWER BI (Calculate, Sum, DatesBetween & Today)
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6 

Quickly Create a Calendar in POWER BI (Urdu/Hindi)
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7 

All and AllExcept DAX in POWER BI (Urdu/Hindi)
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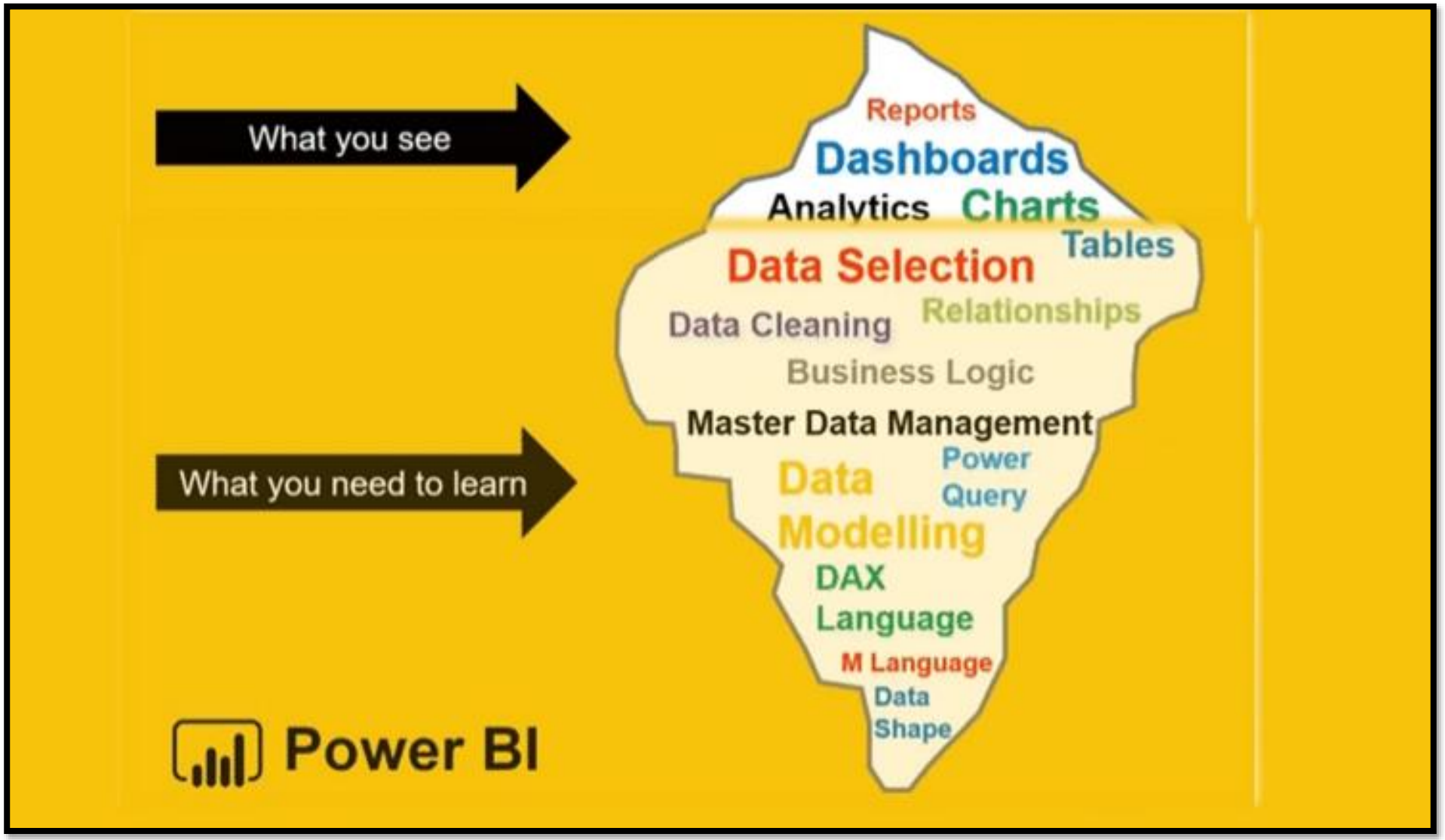
Figure 1. Magic Quadrant for Analytics and Business Intelligence Platforms

Source: Gartner (February 2020)



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The **Four Pillars** of the Power BI Suite

Power Query

Data Model

PBI Reports

PBI Service

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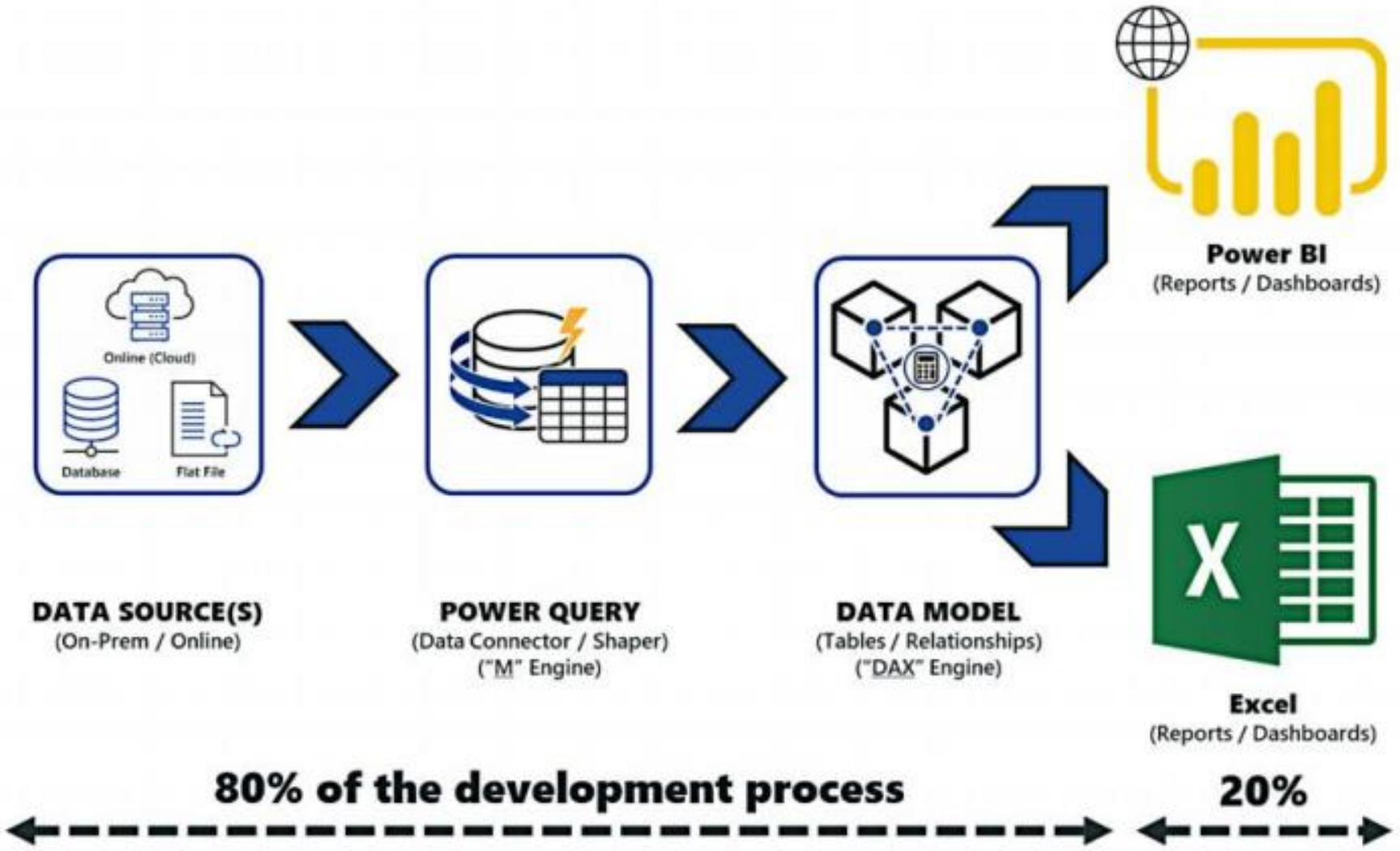

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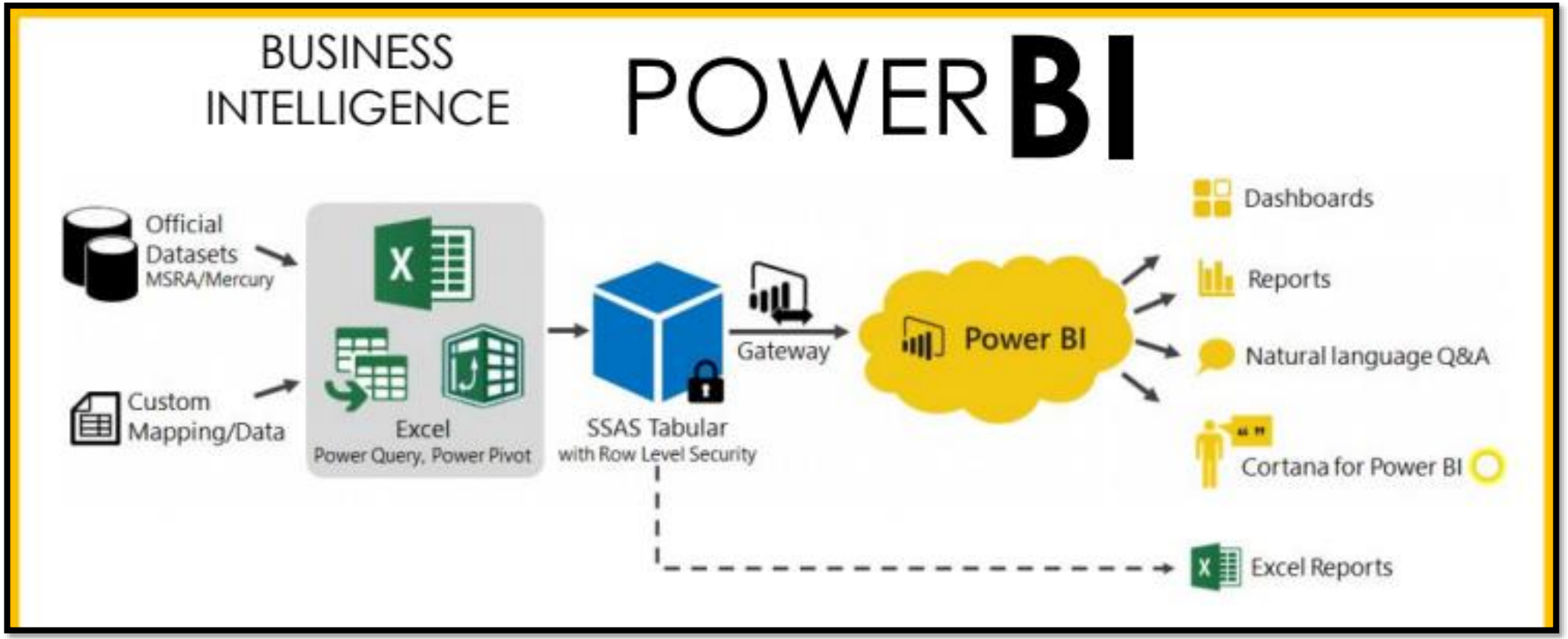

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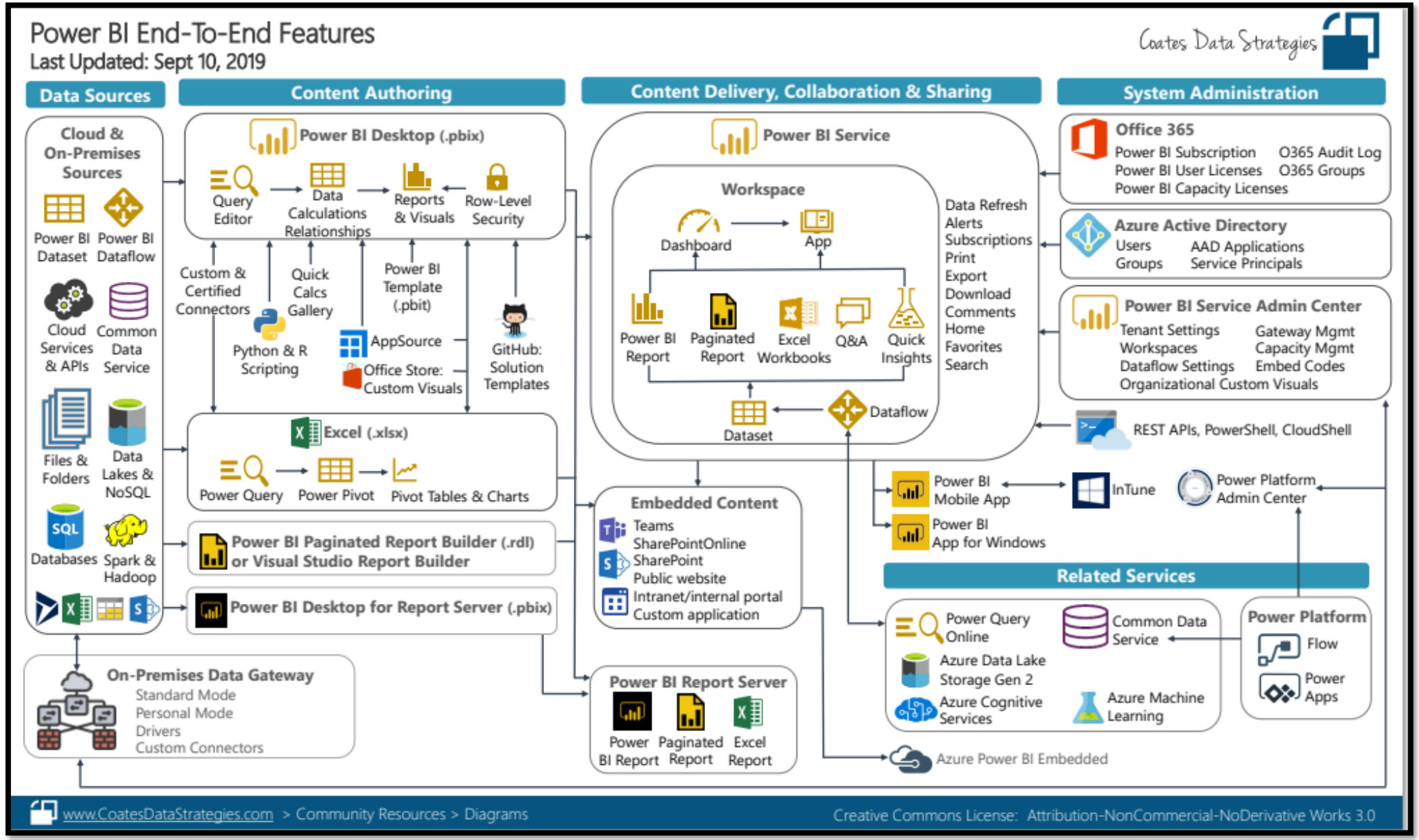

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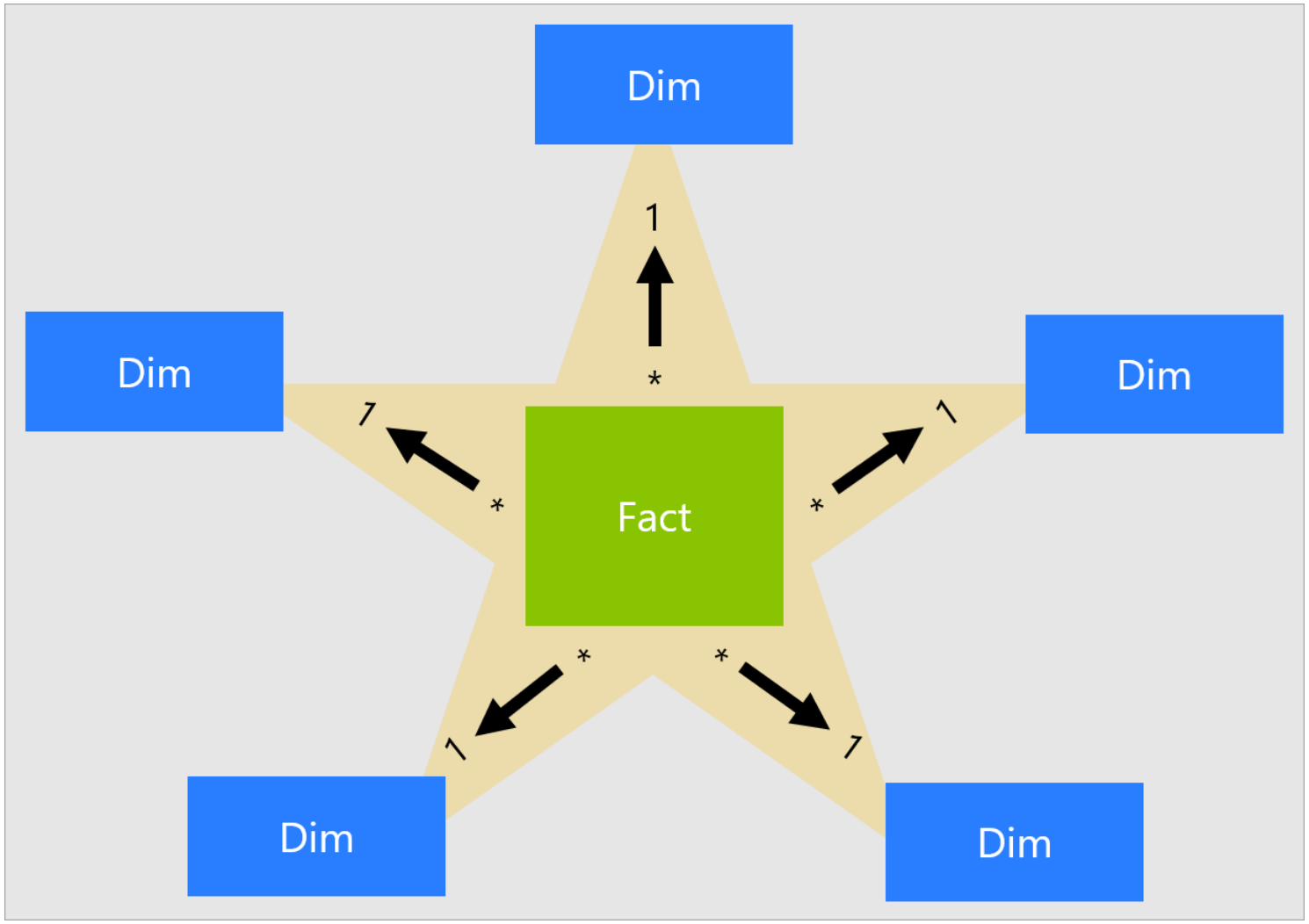
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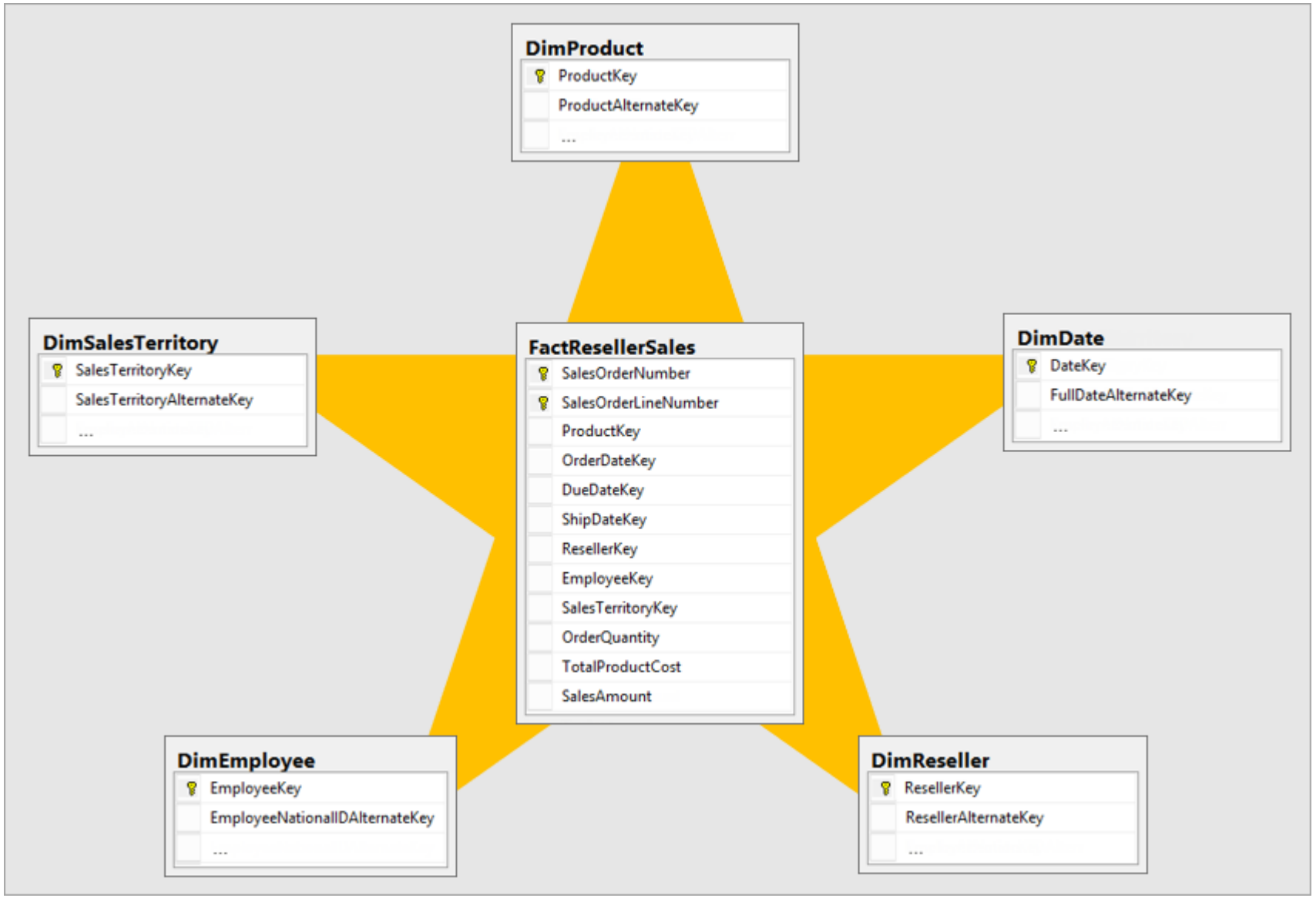
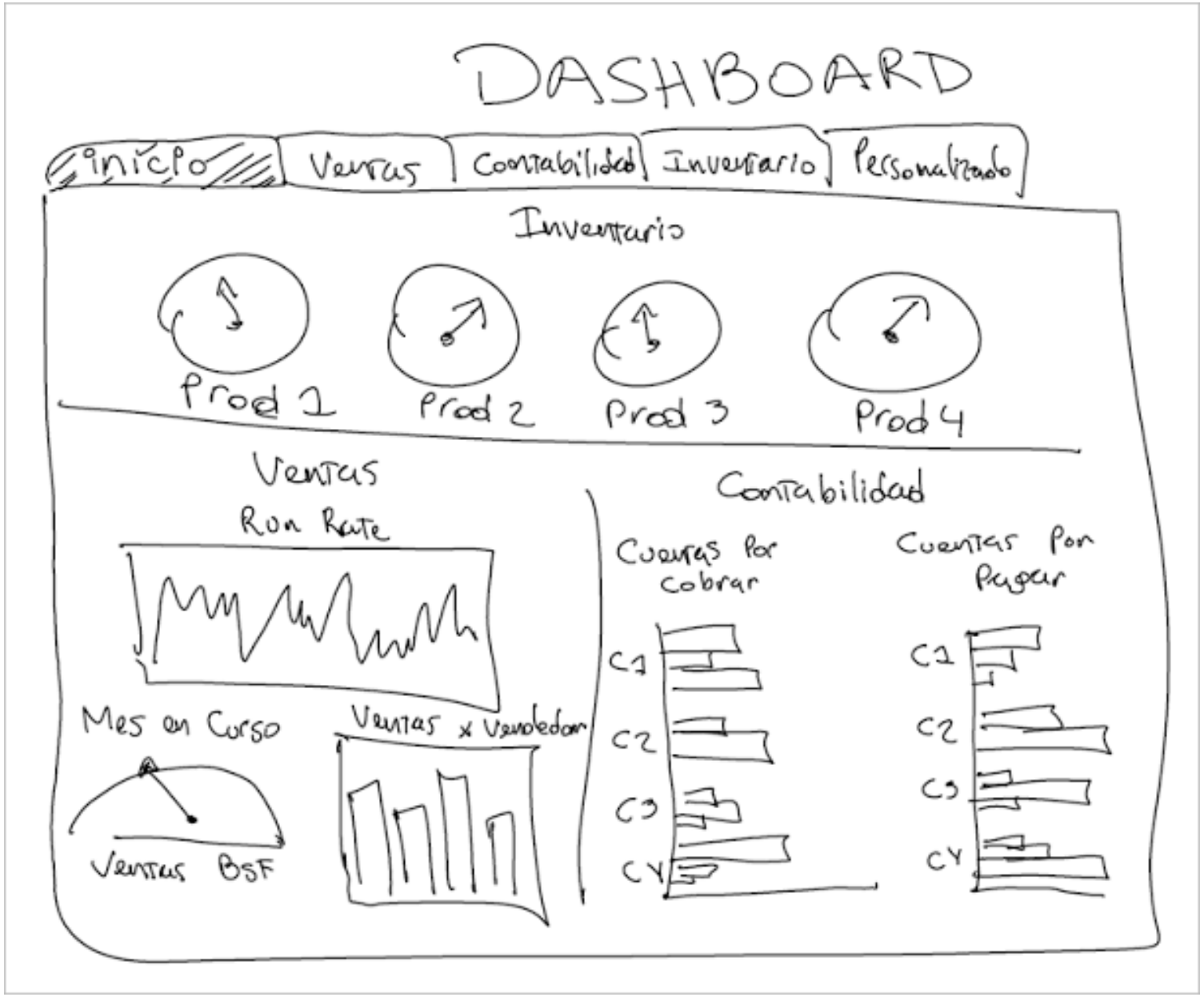
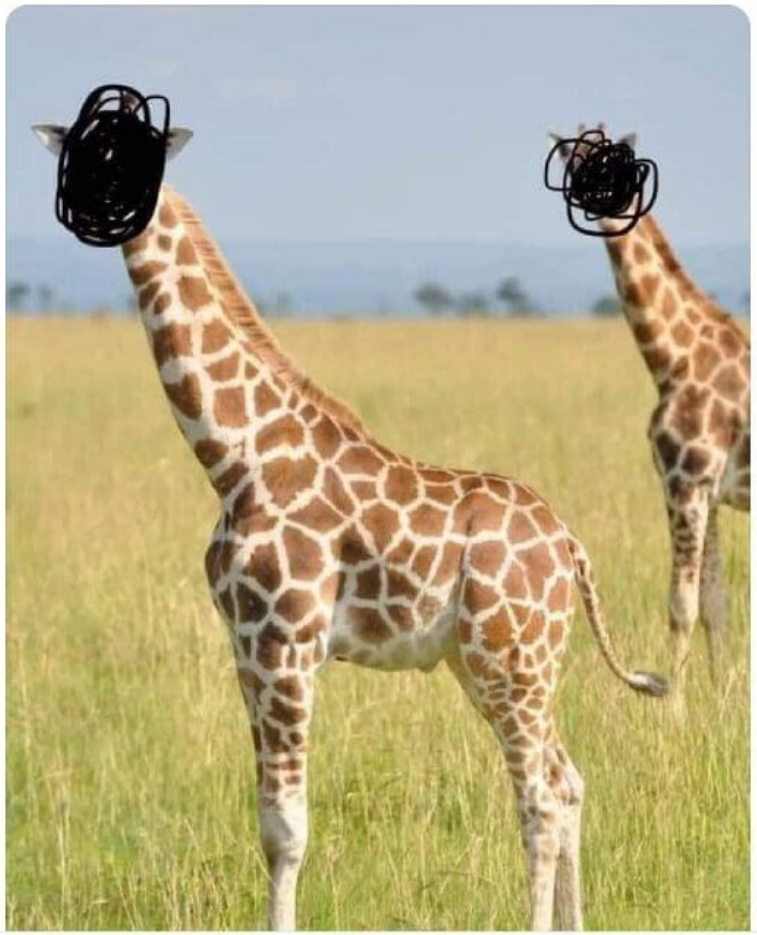




Guess the animal, please. No cheating



POWER BI ? TABLEAU ? QLIKVIEW ?

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FRUITS


Apples


Oranges


Bananas

SPORTS


Cricket


Hockey


Football

BI TOOL

Power BI

tableau

Qlik

NEXT IS NOW!

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Power Platform overview	Power BI	Power Apps	Power Automate	Power Virtual Agents

Technology

Azure Data Platform

Azure SQL

Azure Data Factory

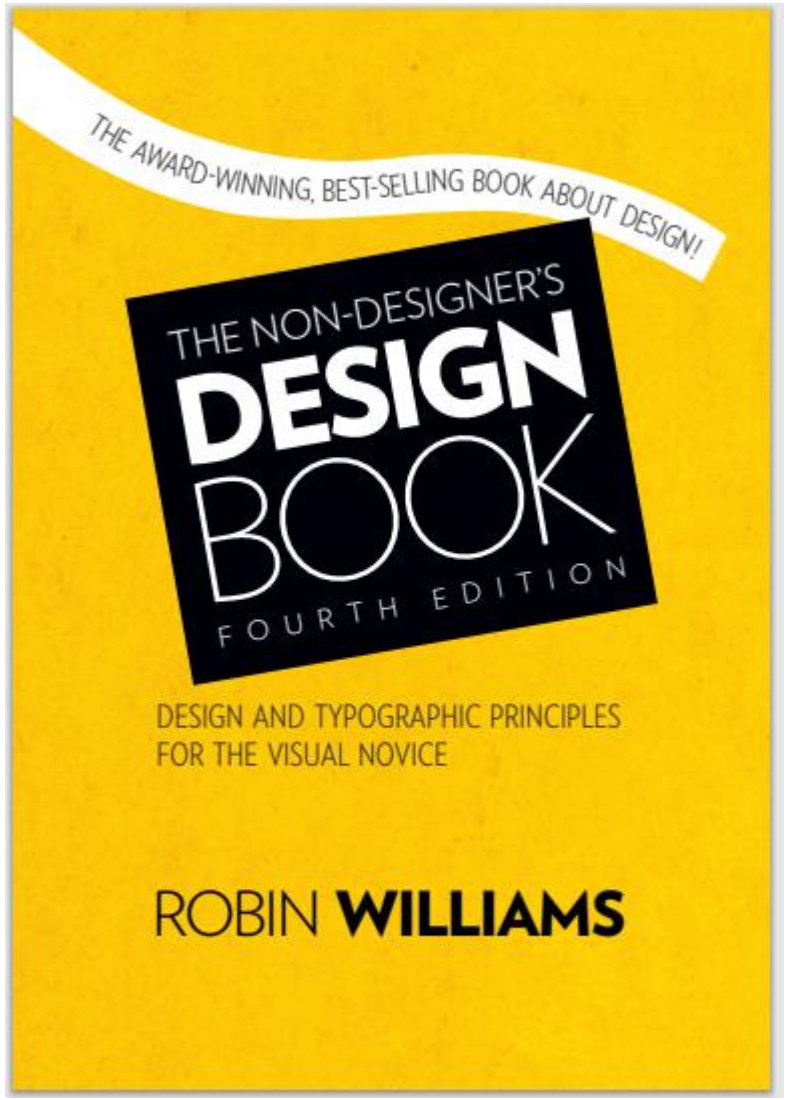
Azure Analysis Services

Power Platform

Power BI

Power App

Power Automate



Design Principles

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THANK YOU

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