

FREE WEBINAR # 08

Basic Banking Analytics in Power BI

Presented by: Muhammad Kashif

6th June 2021



IMPORTANT NOTE

- **Demo Dataset** is already emailed to all the registered participants.
- After the Webinar, **Participants material (including PPT and PBIX file)** will be emailed to registered participants.
- Others may email us at trainings@kaizenanalytic.pk to request for participants material.
- Leave your **comments** in the chat and our team will answer it on the spot.



ABOUT ME

- **Member** of Institute of Cost and Management of Pakistan (Qualified in 2005)
- **Over 17 years** of experience in 360 degree Areas of Finance
(Data Analytics, Corporate/Public Finance, Internal Audit, Supply Chain, Business Process, Finance Modelling, and Capacity Development)
- **Founder of Kaizen Analytic LLP**

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OUR SERVICES PORTFOLIO

Capacity Development

**Finance and Business
Professionals**



Project Implementation

Data Driven Decision
Making



TODAY'S WEBINAR

- **Section 1: Banking Analytics**
- **Section 2: Demo Dataset – Basic Banking Analytics**
- **Section 3: Way Forward**



Section 1

Banking Analytics

Banking Analytics

Analytics can help:

Which customer products are performing the best?

Which regions are hitting their sales targets?

How does Region A compare to other regions?

Are we originating low quality loans?

How we can better manage fraud effectively?

How to measure customer and product profitability?

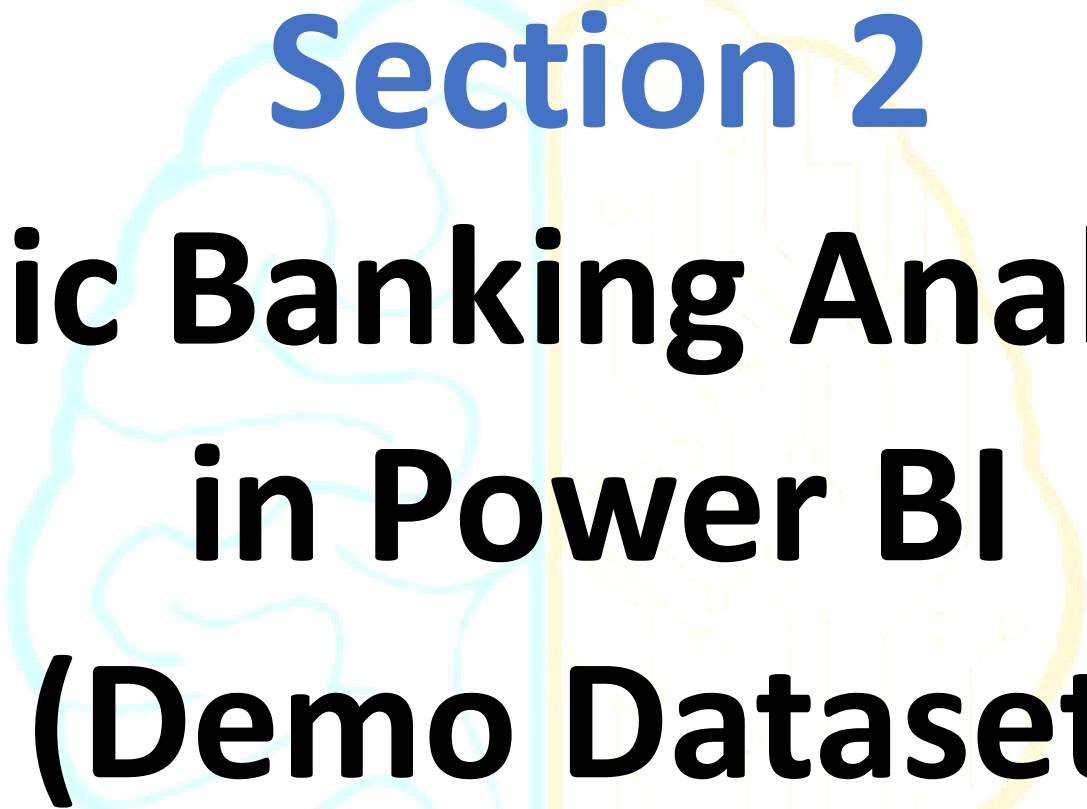
How we can identify “high-potential” prospects and customers?

How to improve the ability to target products and services to prospects or customers?

Banking Analytics

KPI's may include:

- **Operating Expenses As A Percentage Of Assets**
- **Assets Under Management (AUM)**
- **Percentage Of AUM Above Benchmark**
- **Return On Equity**
- **Return On Assets (ROA)**
- **Client Survey Score**
- **Average Time To Close Issues**
- **New Account Setup Error Rate**
- **Accounts Opened With Insufficient Documentation**
- **Total Volume Of Accounts**
- **AUM Per Employee**
- **Operating Profit Per Employee**
- **Sales Per Branch**
- **Number Of Workflow Processes Implemented**

A stylized graphic of a human brain in the background. The left hemisphere is outlined in light blue, and the right hemisphere is outlined in yellow. Inside the yellow outline, there are circuit-like lines and small circles, suggesting a connection between human thought and technology.

Section 2

Basic Banking Analytics in Power BI (Demo Dataset)

Key Pillars of Power BI

- Data Transformation
- Data Modeling
- DAX Functions
- Data Visualization

Level

NA

Beginner

Intermediate

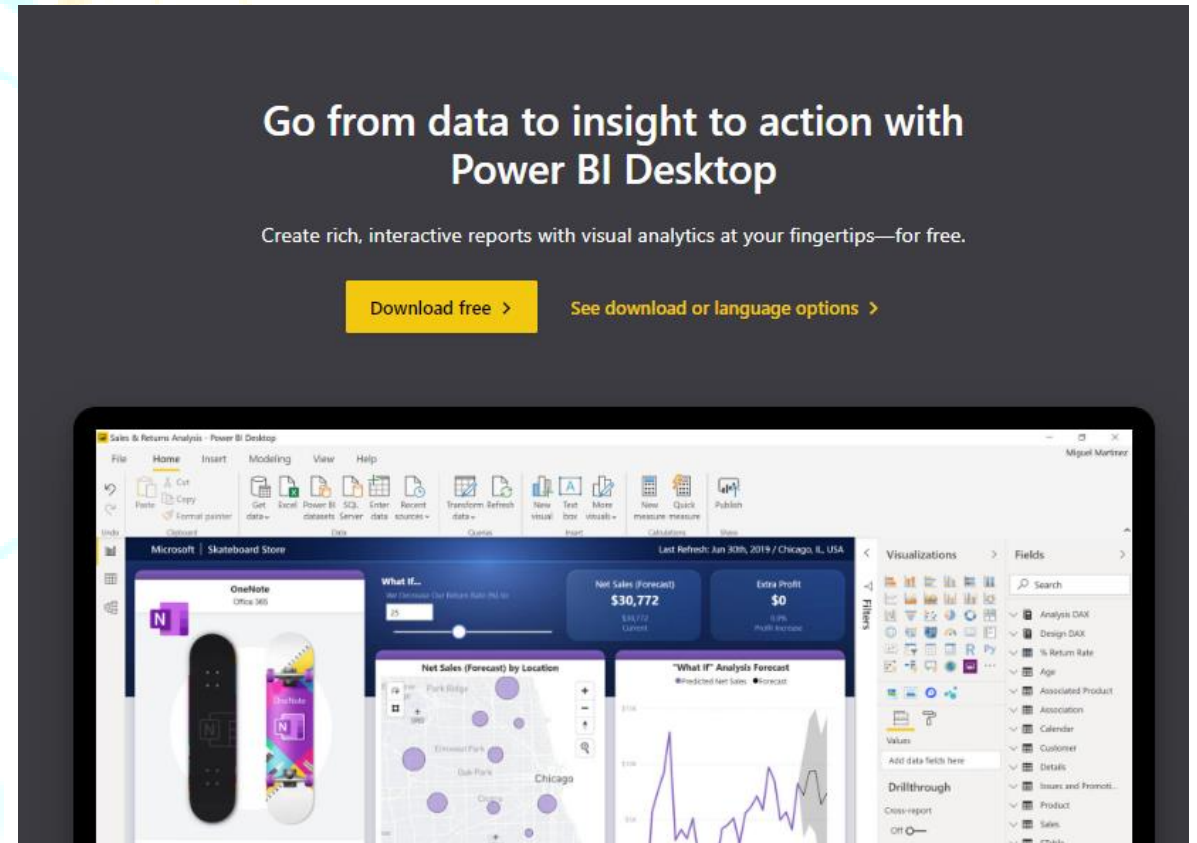
Intermediate

Download Power BI

- Download Link

<https://powerbi.microsoft.com/en-us/desktop/>

- Review the Dataset
- Move to Power BI



A large, faint background graphic of a human brain. The left hemisphere is outlined in light blue, and the right hemisphere is outlined in light yellow. The right hemisphere contains a circuit board pattern with lines and small circles, symbolizing the intersection of human cognition and artificial intelligence.

Section 3

Way Forward

Premium Training Courses

Premium Training Workshops

- Power BI for Finance Professionals
- Advance Financial Reporting and Analysis in Power BI
- Advance Budgeting and Costing in Power BI
- Advance Working Capital Analysis in Power BI
- Management Cockpit in Power BI
- Storytelling with Data for Finance Professional

MORE INFO: Email at trainings@kaizenanalytic.pk or WhatsApp at +92-331-9664911

THANK YOU

Connect to Trainer

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Connect to Power BI for Finance and Business Professionals

 <https://www.linkedin.com/groups/12459235/>

Connect to Us

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