## Financial Statement Reporting and Analysis

Welcome to the Financial Statements Reporting & Analysis! In this challenge, you’ll work with the financial data of a SaaS (Software-as-a-Service) company. The dataset includes two key components - a record of actual income and expenses, and a budget that shows what was planned. Your task is to use this data to build a financial statement report that helps stakeholders understand how the business is performing. Take a closer look at the numbers, explore the insights, and start creating your next financial report! Join the challenge today!

**About**

The FP20 Analytics Challenge 26 is brought to you in collaboration with ZoomCharts. Thanks to this partnership, we're integrating ZoomCharts' exceptional Power BI solutions into this competition. You will gain skills to create Pro reports that help business users explore data faster and more intuitively.

To participate in the challenge with ZoomCharts, [register here](https://zoomcharts.com/en/microsoft-power-bi-custom-visuals/challenges/fp20analytics-march-2024?utm_source=challenge&utm_medium=fp20analytics&utm_campaign=fp20analytics_web_march&utm_term=register&utm_content=registration) and create a Power BI report including at least 2 ZoomCharts Drill Down Visuals on one report page.

**Why participate in the Challenge with ZoomCharts?**

1. **Personalised feedback ️**  
   The ZoomCharts team provides personalised feedback to EVERY report entry that meets the requirements. This allows all participants to hone their skills and adjust their report before the deadline, giving you an extra competitive edge in the challenge.
2. **Receive a free license**  
   Upon signing up for the challenge, you will receive a FREE Drill Down Visuals Developers License to access the complete Drill Down Visuals PRO library.  
   This license remains active for a year after the last challenge you take part in. This means you can access the latest advanced data visualization tools to enhance your projects for a year.
3. **Learning resources**   
   Participants receive all the latest information on upcoming workshops and events, where our team of proven professionals shares their knowledge and tips on how to visualise the given dataset for the challenge.  
   You can also book 1:1 calls with a Power BI mentor, who will analyse your report and give specific suggestions for improving it.
4. **The main prize**   
   Last but not least, entering the challenge with ZoomCharts puts you in the running for an additional $300 Amazon gift card!

**Introduction**

Below is your show time. Read me carefully!

**Timeline**

Start: **Wednesday, the 30th of April 2025** at 3:00 pm UK time

Submission Deadline: **Thursday,** **the 21st of May 2025** at 11:59 pm UK time

Workshop: **Tuesday,** **the 13th of May 2025** at 14:00 pm UK time

Winners’ announcement: **Tuesday, the 27th of May 2025** at 14:00 pm UK time

**Access to the LinkedIn Group and Forum**

**https://www.linkedin.com/groups/12751070/**  
  
**NovyPro:**  
**https://www.novypro.com/**  
  
**Instructions Video:**  
[**https://www.youtube.com/watch?v=jkcAYgFGWUY**](https://www.youtube.com/watch?v=jkcAYgFGWUY)

#### **Questions:**

#### The questions below are designed to help you explore different aspects of the company’s financial performance. They are not requirements; they are here to guide your thinking and help you focus your analysis.

**Financial Overview & Performance**

* Over the year, did the company spend more or less than planned?
* Was the company profitable each month, or did expenses exceed income at any point?
* Which categories or accounts show the most significant difference between budget and actual figures?

**Revenue Insights**

* What are the primary revenue sources, and which generates the most income?
* How does revenue change over time — are there any seasonal peaks or slowdowns?
* Which clients or deals brought in the highest individual payments?
* Were there specific months when revenue was noticeably lower than planned?

**Expense Insights**

* What are the top 5 spending categories by total amount?
* Which vendors or service providers (e.g., AWS, Stripe) received the most money overall?
* Are there any expense categories that regularly exceeded their budget?
* In which months did spending increase sharply, and what caused it?

**Trends & Patterns**

* Are there any repeating monthly or seasonal patterns in revenue or spending?
* Which months show the best alignment between budgeted and actual figures?

#### **Technical Requirements**

* All tools are permitted for FP20 Analytics Challenge.
* For ZoomCharts Challenge: create a Power BI report including at least 2 ZoomCharts Drill Down Visuals in one report page.
* Reports are restricted to a maximum of two pages.
* Canvas size is 16:9 (Default Power BI size) or Full HD size = w:1920 - h:1080.

##### **Judging Criteria**

Business users use reports to make data-driven decisions. That’s why reports are called effective if they enable users to drill down and filter data quickly and intuitively to find answers to any question they might have and analyse data in all possible directions and dimensions. We will evaluate:

**1) How easy is it to understand the data? (max 10 points)**

* Is too much text used for explanation?
* Are the indicative colours in charts instinctually understandable?
* Does it tell a story?

**2) How easy-to-use is the report? (max 14 points)**

* Cross-chart filtering implementation across the report. Can other visuals provide relevant data as the user explores the report?
* Response time
* Drill Down: multi-layer data exploration. Can the user drill down and gain additional insights within the report?
* Use of tutorial overlays and other elements to assist new users. Can a new user start using this report straight away with just the guidance provided within the report itself?

**3) How good is the report design and is it suitable for its purpose? (max 10 points)**

* Visual design: is the overall look consistent, no empty spaces, no overcrowding?
* Interface design: are there unnecessary visualisations/buttons/complexity in use?
* UX design: is the produced report usable?
* Report design: is the main challenge answered?
* Technical: are all the fonts used the same, are the sizes readable?

You are encouraged to enhance your analysis by using various techniques, such as tooltips, drill-throughs, drill-downs, cross-chart filtering, and page navigation features.

### **The Resources.**

1. Excel Spreadsheet with dataset and data dictionary.

2. PDF with the Intro and Brief in English.

3. PDF with the Intro and Brief in Spanish.

### **Zoomcharts Resources.**

Resources that will inspire you to master Power BI reports that end-users will love:

1. [Use-Case Gallery](https://zoomcharts.com/en/microsoft-power-bi-custom-visuals/dashboard-and-report-examples/?utm_source=challenge&utm_medium=fp20analytics&utm_campaign=fp20analytics_web_march_2024&utm_term=resources&utm_content=use-case_gallery): Try live demos and download reports made by the ZoomCharts team

2. [Video tutorials](https://academy.zoomcharts.com/?utm_source=challenge&utm_medium=fp20analytics&utm_campaign=fp20analytics_web_march_2024&utm_term=resources&utm_content=video_tutorials): Watch engaging video guides on how to set up and use the visuals

3. [Documentation](https://zoomcharts.com/en/microsoft-power-bi-custom-visuals/documentation/general/getting-started/?utm_source=challenge&utm_medium=fp20analytics&utm_campaign=fp20analytics_web_march_2024&utm_term=resources&utm_content=documentation): Technical deep-dive about ZoomCharts visuals

4. [ZoomCharts Blog](https://zoomcharts.com/en/microsoft-power-bi-custom-visuals/blog/?utm_source=challenge&utm_medium=fp20analytics&utm_campaign=fp20analytics_web_march_2024&utm_term=resources&utm_content=blog): Useful tips & tricks for data visualization and report creation

5. [Visuals Gallery](https://zoomcharts.com/en/microsoft-power-bi-custom-visuals/gallery/?utm_source=challenge&utm_medium=fp20analytics&utm_campaign=fp20analytics_web_march_2024&utm_term=resources&utm_content=visuals_gallery): Explore all the possible customization options for Drill Down Visuals.

### **Submissions of Entries.**

**\*IMPORTANT\***

To submit your two-page report, please follow these steps, if you want to be considered for the Zoomcharts' prize, otherwise post your entry in the challenges group.

### **1.**[**Submit your entry .pbix file here.**](https://zoomcharts.com/en/microsoft-power-bi-custom-visuals/challenges/fp20analytics-march-2024?utm_source=challenge&utm_medium=fp20analytics&utm_campaign=fp20analytics_web_march&utm_term=register&utm_content=registration) Your report will undergo validation to ensure it meets all the technical requirements. If the report is valid, you will receive a 'Publish to Web' link. If it does not meet the requirements, you will receive a rejection reason and will have the opportunity to resubmit your report.

### **2. Post your submission on LinkedIn:**

1. Upload the report as a PDF document on your LinkedIn feed.

2. Use the caption "I am participating in FP20 Analytics Challenge 26” and screenshots from your report.

3. Include a summary of your report's key insights and publish it on the web or via a NovyPro link.

4. Use the hashtags #FP20Analytics, #FP20FinancialStatementsReportingAndAnalysis, #builtwithzoomcharts, tag @Federico Pastor and @Zoomcharts.

5. Post your report in [the FP20 Analytics LinkedIn Community Group.](https://www.linkedin.com/groups/12751070/)

### **Dataset.**

### **Click on the link below to get your dataset: The files contain all the necessary data and information to create your report.**

### **Dataset** **Intro & Brief in English** **Intro & Brief Español**

\*If you have any questions, please post them in the challenges group; a member of the team will get back to you ASAP. Please do not send challenge questions via private messages to the team members; these will not be answered.