Financial Expense Optimization

Problem Statement

A mid-size enterprise tracks expenses across departments such as HR, IT, Finance, and Operations. Despite stable revenue, operational costs are rising, causing profit margins to shrink.

Finance leadership wants better visibility into:

• Department-wise expense distribution

• Monthly spending patterns

• Expense categories contributing to overspending
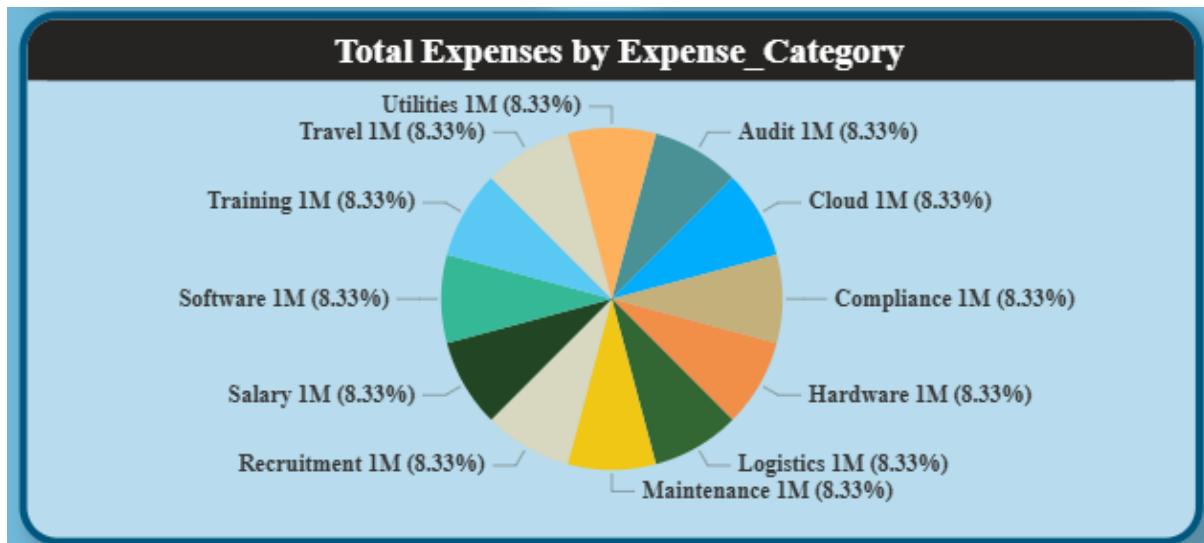
Your role is to prepare a financial monitoring dashboard that helps management:

• Control unnecessary expenses

• Detect cost overruns early

• Support budgeting decisions
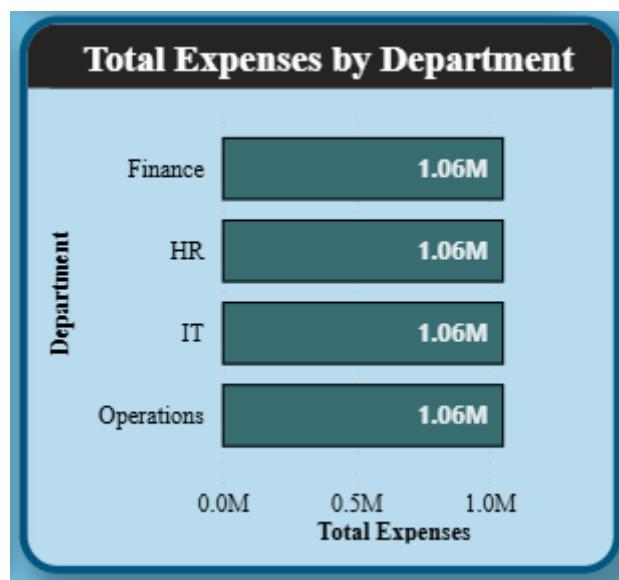
Questions:

• Identify missing or inconsistent expense data.

• Which departments incur the highest total expenses?

• Analyze expense distribution across expense types.

• How do monthly expenses trend over time?

• Create DAX measures for Total Expenses and Monthly Average Expense.

• Compare actual expenses against budget using visuals.

• Identify departments exceeding budget limits.

• Design a financial monitoring dashboard.

• What cost-control actions can be recommended?
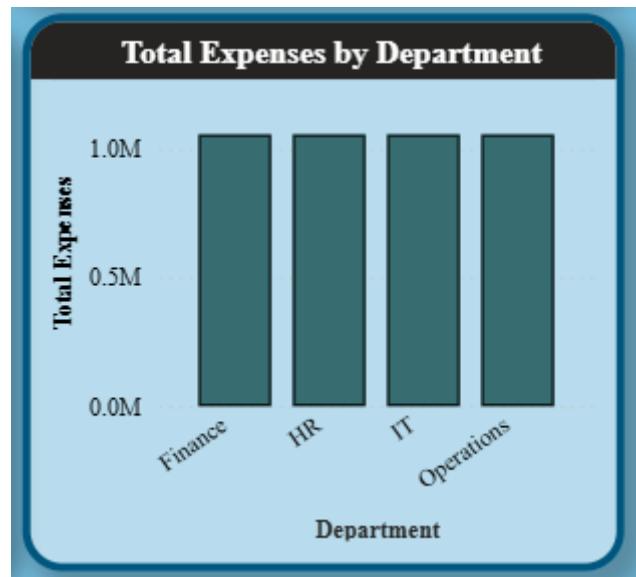
Total Expenses by Expense Category

Total Expense by Department

Total Expense by Department

Total Expenses by Department

Expense Table

Total Expenses	Total Budget	Budget Variance	Budget Utilization %	Department
1055000	1035000	20000	101.93	Finance
1055000	1035000	20000	101.93	HR
1055000	1035000	20000	101.93	IT
1055000	1035000	20000	101.93	Operations
1055000	**1035000**	**20000**	**101.93**	

Final Project

Financial Expense Optimization

1M	1M	20K	351.67K
Total Expenses	Total Budget	Budget Variance	Monthly Avg Expense

Total Expenses by Expense_Category

- Utilities 1M (8.33%)
- Travel 1M (8.33%)
- Audit 1M (8.33%)
- Training 1M (8.33%)
- Cloud 1M (8.33%)
- Software 1M (8.33%)
- Compliance 1M (8.33%)
- Salary 1M (8.33%)
- Hardware 1M (8.33%)
- Recruitment 1M (8.33%)
- Logistics 1M (8.33%)
- Maintenance 1M (8.33%)

Total Expenses by Department

Department	Total Expenses
Finance	1.06M
HR	1.06M
IT	1.06M
Operations	1.06M

Total Expenses by Department

Total Expenses	Total Budget	Budget Variance	Budget Utilization %	Department
1055000	1035000	20000	101.93	Finance
1055000	1035000	20000	101.93	HR
1055000	1035000	20000	101.93	IT
1055000	1035000	20000	101.93	Operations
1055000	**1035000**	**20000**	**101.93**	

Total Expenses by Month