DRIVING TABLEAU IN FINANCE

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Consulting &Training

Contents

Introduction to Tableau in Finance

The Driving Tableau in Finance course teaches you how to use Tableau, a powerful data visualization and analysis tool, for financial purposes. You will learn how to create interactive dashboards, perform advanced calculations, and tell data-driven stories with Tableau. This course is designed for finance professionals who want to enhance their skills in data analysis and communication.

Why Choose Chools?

Numbers That Speak for Themselves:

- **10,000+ Successful Alumni:** Join a network of impactful professionals.
- **95% Job Placement Rate:** Secure your future with Chools' proven track record.
- **20+ Years of Excellence:** Trust in a legacy of education and industry expertise.
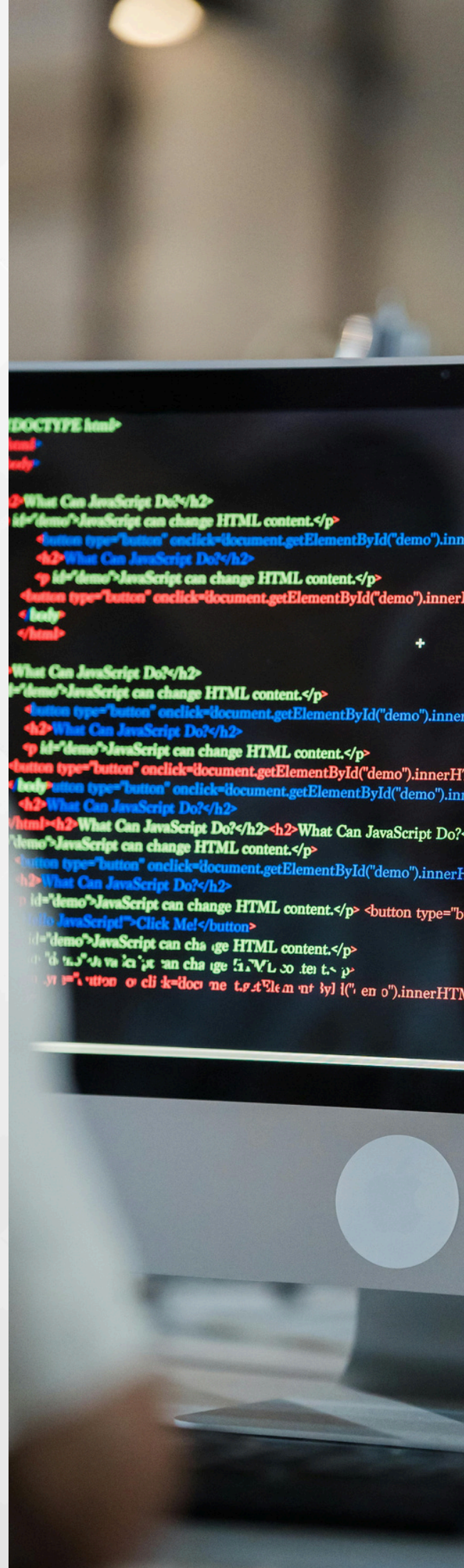- **200+ Industry Partnerships:** Leverage our connections for real-world insights and opportunities.

What Sets Us Apart?

- **Expert Instructors:** Learn from industry veterans with hands-on experience.
- **Hybrid Learning Model:** Balance online flexibility with in-person engagement.
- **Comprehensive Curriculum:** Stay ahead with courses designed meet market demands.
- **Community and Networking:** Be part of an active community of learners and professionals.

Who Can Apply?

Eligibility Criteria:

- Intermediate to advanced users of Tableau.
- Prior knowledge of financial accounting and data modeling is recommended.

Program Overview

The Tableau in Finance Program provides a comprehensive education in using Tableau for financial analysis and reporting. Our curriculum covers a wide range of topics to ensure a thorough understanding, combining theoretical knowledge with practical, hands-on experience.

Learning Mode:

- **Hybrid Learning Model**: Combines online learning with in-person sessions for flexibility and interactive engagement.
- **Interactive Sessions**: Includes live webinars, workshops, and Q&A forums with expert instructors and peers.
- **Self-paced Learning**: Access course materials anytime, allowing you to learn at your own pace.

PROGRAM OBJECTIVES

- Create interactive dashboards and reports using Tableau.
- Perform advanced calculations and data analysis with Tableau.
- Tell data-driven stories and communicate insights effectively.
- Evaluate financial statements and perform various financial analyses.
- Utilize Tableau for advanced financial reporting and decision-making.
- Foster continuous learning and personal growth.
- Encourage teamwork and collaboration.
- Prepare for roles in business intelligence, financial analysis, and data visualization.

EXPECTED OUTCOMES

- Proficiency in using Tableau for financial analysis and visualization.
- Practical experience through hands-on exercises.
- Strong analytical and problem-solving skills.
- Application of best practices in financial analysis using Tableau.
- Innovation in understanding and managing financial data.

SKILLS LEARNED

- **Data Import and Transformation:** Techniques for importing, transforming, and cleaning financial data in Tableau.
- **Data Modeling:** Skills in modeling financial data from various sources using Tableau.
- **Dashboard and Report Creation:** Creating interactive dashboards and reports to communicate insights with Tableau.
- **Advanced Calculations:** Performing advanced calculations for financial analysis in Tableau.
- **Financial Analysis Using Tableau:** Utilizing Tableau for various financial analyses such as ratio, trend, and variance analysis.
- **Data Storytelling:** Telling data-driven stories and communicating insights effectively with Tableau.
- **Ethics:** Applying ethical standards and professional conduct in financial analysis and data visualization.
- **Strategic Thinking:** Developing and implementing strategic financial initiatives using Tableau.
- **Decision-Making:** Making informed decisions based on financial analysis insights with Tableau.
- **Communication Skills:** Enhancing communication and interpersonal skills through data visualization.

Program Outline

Required Core Modules

Module 1: Introduction to Tableau
- Basics of Tableau and its applications in finance.

Module 2: Data Import and Transformation I
- Techniques for importing and transforming financial data in Tableau.

Module 3: Data Import and Transformation II
- Advanced data transformation techniques in Tableau.

Module 4: Data Cleaning and Modeling I
- Basics of cleaning and modeling financial data in Tableau.

Module 5: Data Cleaning and Modeling II
- Advanced techniques for data cleaning and modeling in Tableau.

Module 6: Dashboard and Report Creation I
- Creating interactive dashboards and reports with Tableau.

Module 7: Dashboard and Report Creation II
- Advanced techniques for dashboard and report creation in Tableau.

Module 8: Advanced Calculations I
- Basics of performing advanced calculations in Tableau.

Module 9: Advanced Calculations II
- Advanced calculation techniques for financial analysis in Tableau.

Module 10: Financial Analysis Using Tableau I
- Utilizing Tableau for financial analysis and reporting.

Module 11: Financial Analysis Using Tableau II
- Advanced financial analysis techniques using Tableau.

Module 12: Data Storytelling I
- Telling data-driven stories with Tableau.

Module 13: Data Storytelling II
- Advanced data storytelling techniques in Tableau.

Module 14: Ratio and Trend Analysis I
- Performing ratio and trend analysis using Tableau.

Module 15: Ratio and Trend Analysis II
- Advanced ratio and trend analysis techniques in Tableau.

Module 16: Financial Analysis Ethics
- Understanding and applying ethical standards in financial analysis and data visualization.

Enrollment Now Open!

Take the first step towards mastering Tableau in finance. Enroll in our **Driving Tableau in Finance** Program and enhance your career with Chools.