



Power BI Executive Dashboards and Management Reporting Training Course

28 June – 2 July 2027
San Diego



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Overview

Power BI Executive Dashboards and Management Reporting Training Course is a one-week course for executives, managers, analysts, reporting functions, and business intelligence teams, who leave with an Executive Dashboard and Reporting Pack. Participants connect decision questions to KPI definitions, prepared data, semantic models, DAX measures, visual selection, and executive narratives. The course turns fragmented management reporting into a structured dashboard workflow. Agile Leaders Training Center develops practical Power BI executive reporting capability.

Who Should Attend

- Executive functions responsible for reviewing performance, exceptions, trends, and decisions
- Management functions responsible for operational and financial reporting
- Analysis functions responsible for preparing measures, comparisons, and explanations
- Reporting functions responsible for dashboard layout, controls, and publication
- Business intelligence functions responsible for models, measures, visuals, and access

The course assumes participants can work with business tables and reporting questions, and leaves out certification preparation, advanced data engineering, and platform administration.

Departments and Industries

The course supports departments and industries that convert performance data into management decisions.

- Strategy, finance, operations, performance, and executive offices
- Business intelligence, data analysis, reporting, and internal control
- Financial services, professional services, retail, and hospitality
- Manufacturing, logistics, construction, utilities, and property services
- Healthcare, education, technology, telecommunications, and nonprofit organizations

Learning Objectives

By the end of this course, participants will be able to:



- Apply decision questions and KPI definition methods
- Build prepared data and dimensional semantic models
- Use DAX measures for targets, trends, and variances
- Evaluate visual selection, layout, filters, and navigation
- Diagnose report quality, refresh, and access issues
- Build executive narratives and management dashboards

Course Agenda

Day 1: Define Executive Reporting Needs

- Executive Decision Question Canvas
- Audience and Use Context Map
- KPI Definition and Target Sheet
- Measure, Dimension, and Time Grain Register
- Executive Reporting Requirement Backlog

Day 2: Prepare Models and Measures

- Power Query Data Preparation Checklist
- Dimensional Semantic Model Diagram
- Table Relationship and Filter Direction Map
- DAX Measure Definition Sheet
- Variance, Trend, and Target Calculation Set

Day 3: Design Executive Report Pages

- Visual Selection Decision Matrix
- One-Screen Information Hierarchy Grid
- KPI Card and Context Pattern
- Comparison, Trend, and Exception Layout
- Color, Scale, Label, and Precision Checklist

Day 4: Build Interaction and Reporting Controls

- Filter, Slicer, and Cross-Highlight Plan
- Drillthrough and Page Navigation Map
- Executive Narrative Storyboard
- Refresh, Access, and Distribution Checklist
- Dashboard Quality and Usability Review



Day 5: Practice Executive Dashboarding

- Exercise: Define Decisions, KPIs, and Targets
- Exercise: Build a Semantic Model and DAX Measures
- Exercise: Design Visual Hierarchy and Interactions
- Exercise: Present Variances and Executive Narratives
- Capstone: Executive Dashboard and Reporting Pack

Practical Exercises

The course uses suggested activities based on performance reporting in finance, operations, sales, services, and project environments.

- Suggested activity: convert management questions into KPI definitions, targets, time grains, dimensions, and decision rules.
- Suggested activity: prepare source tables, arrange a dimensional model, define relationships, and create DAX measures for trend and variance analysis.
- Suggested activity: select visuals, organize a one-screen hierarchy, configure filters and drillthrough, and test interactions.
- Suggested activity: present an executive narrative supported by quality checks, refresh notes, access controls, and accountable actions.

FAQs

Who suits Power BI executive dashboard training, and what does it assume?

Executive, management, analysis, reporting, and business intelligence functions suit the course; it assumes familiarity with business tables and reporting questions, without requiring advanced engineering or administration experience.

How does Power BI executive reporting differ from general Power BI analytics training?

Power BI executive reporting focuses on decision questions, KPIs, one-screen layouts, controlled interactions, management narratives, and action; general analytics training covers a broader range of exploration and technical features.

What makes a Power BI executive dashboard decision-ready?

A Power BI executive dashboard becomes decision-ready when it presents relevant KPIs, targets, variances, trends, exceptions, context, and navigation in a readable hierarchy linked to clear management questions.



How should DAX measures support management reporting?

DAX measures should encode agreed definitions, calculation context, targets, time comparisons, and variance logic so that dashboard values remain consistent across visuals and filters.

How should Power BI dashboard quality be reviewed?

Power BI dashboard quality should be reviewed for source accuracy, model relationships, measure logic, filter behavior, visual clarity, scale consistency, refresh status, access, performance, and alignment with decision needs.

Conclusion

Participants take back an Executive Dashboard and Reporting Pack containing decision canvases, KPI definitions, model diagrams, DAX measure sheets, visual layouts, interaction maps, quality checks, and narrative structures. It changes disconnected reporting into a decision-linked Power BI workflow. The pack supports consistent measures, readable insights, controlled distribution, and accountable management action.