

Building Tomorrow's Credit Management Tools Today: Power BI Fueled By AI



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Building Tomorrow's Credit Management Tools Today: Power BI Fueled By AI

- Introduction
- What is Power BI?
- Steps to Create a Dashboard
- Live Demonstration
- Q&A Session

Examples of Reports Created with Power BI

Rapport : Dernières transactions
Dépt. du

Tableau de bord #3 : Revenus et dépenses
Dépt. du crédit

Recherche de projet
Adresse, Ville, Client, Nom projet, Soumission
1521*pins

Tableau de bord #2 : Analyse client du crédit

Historique facturation par ville du projet

● Ajustement
● Avocat ext.
● Carte crédit
● Dépenses crédit
● Intermédiaire pmt

What is Power BI?

It's a powerful data visualization tool

1. Why Use Power BI?

- A Microsoft solution
- User-friendly interface
- Real-time Insights
- Customizable Visuals
- Cost-effective solution

2. Key Features:

- Data connection (Excel, SQL, online services)
- Data transformation and modeling
- Creation of interactive and visual reports

3. Benefits:

- Fast Deployment: Enables quick implementation and immediate value for businesses
- Interactive Dashboards: Empowers users to explore data dynamically and gain deeper insights

Steps to Create a Dashboard

A simple 4-step process

1. Connecting to Data

- Import data from different sources (Excel, SQL, Web, etc.)
- Verify and clean raw data

2. Data Transformation and Modeling

- Use Power Query to clean, transform, and structure data
- Create relationships between tables
- Prepare data for analysis






3. Creating Visualizations

- Choose appropriate charts and visuals (tables, bar charts, maps)
- Arrange visuals on the dashboard
- Use slicers and filters for more precise analysis

4. Sharing and Publishing

- Publish the dashboard to Power BI Service (online access)
- Share with colleagues and collaborate in real-time

Beware of Common Pitfalls

-  **Incorrect data relationships**
-  **Check totals**
-  **Visual overload**
-  **Incorrect filtering**
-  **Data updates**

Live Demonstration

November 2025 | Caesars Palace | Las Vegas, NV

Actionable Takeaways

1) Start small, but structure your data

Before building complex dashboards, connect Power BI to a simple Excel file or your ERP data.

Use Power Query to clean and organize your dataset.

A solid structure is the foundation of reliable insights.

2) Automate follow-ups, not just tasks

Design dashboards that trigger action: highlight overdue accounts, flag high-risk customers, or show regional trends.

Power BI isn't just for analysis: it's a decision-making tool.

3) Use ChatGPT as your Power BI assistant

Ask it to generate DAX formulas, suggest visuals, or explain Power BI concepts.

Combining AI with Power BI accelerates learning and boosts the impact of your credit management reporting.

Please tell us what you think!

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QUESTIONS?

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