

# Building Tomorrow's Tools Today - For Free: From Excel to Power BI with ChatGPT

## Live Build: From Excel to Power BI

*No slides. No theory.  
Just real results.*



*Built live in under **50** minutes.*



Presented by: Martin Girard, CPA

# Do you need NASBA CPE credits?

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# About me

## CPA with nearly 25 years of experience in finance & accounting

- 15 years at Barrette Structural
- 10 years across multiple organizations

## Specializations:

- Data analysis (Power BI, Access)
- Process improvement
- Credit management

Passionate about **turning data & AI** into **practical tools**

Active speaker in Credit & AP communities across Canada & U.S.



# IOFM Spring

CONFERENCE & EXPO

May 13, 2026

10:15 AM - 11:05 AM EST

Grand Caribbean 8-10

## Building Tomorrow's Tools Today – For Free:

From Excel to Power BI with ChatGPT



Start with Excel



Use ChatGPT for speed and insight



Build in Power BI



Get actionable AP insights



A Blueprint for AP Teams  
Under Pressure to Deliver More with Less

I don't nap, I automate. AP Superhero in training!

AP TEAMS DELIVER

Build Powerful AP Solutions

- ✓ No Cost
- ✓ Tools You Already Use
- ✓ Insights You Can Act On
- ✓ Results You Can Measure

Live. Practical. Tactical. For AP.

- Live Build in Real Time
- Real AP Use Cases
- Q&A with Martin Girard
- Take It Back. Use It Tomorrow.






You'll Leave With:

- ✓ Live Demo
- ✓ Step-by-Step Frameworks
- ✓ Practical Use Cases
- ✓ Tools You Can Use Today

More Insights.  
Less Manual Work.  
Stronger AP.



# The Reality of Finance Work

-  **We don't lack data...**  
We lack **time** to use it properly.
-  **We don't lack systems...**  
We struggle to **connect** them.
-  **We don't lack talent...**  
We waste it on **repetitive work**.



**TIME**  
is the  
**constraint**



**AI**  
is **NOT**  
the solution



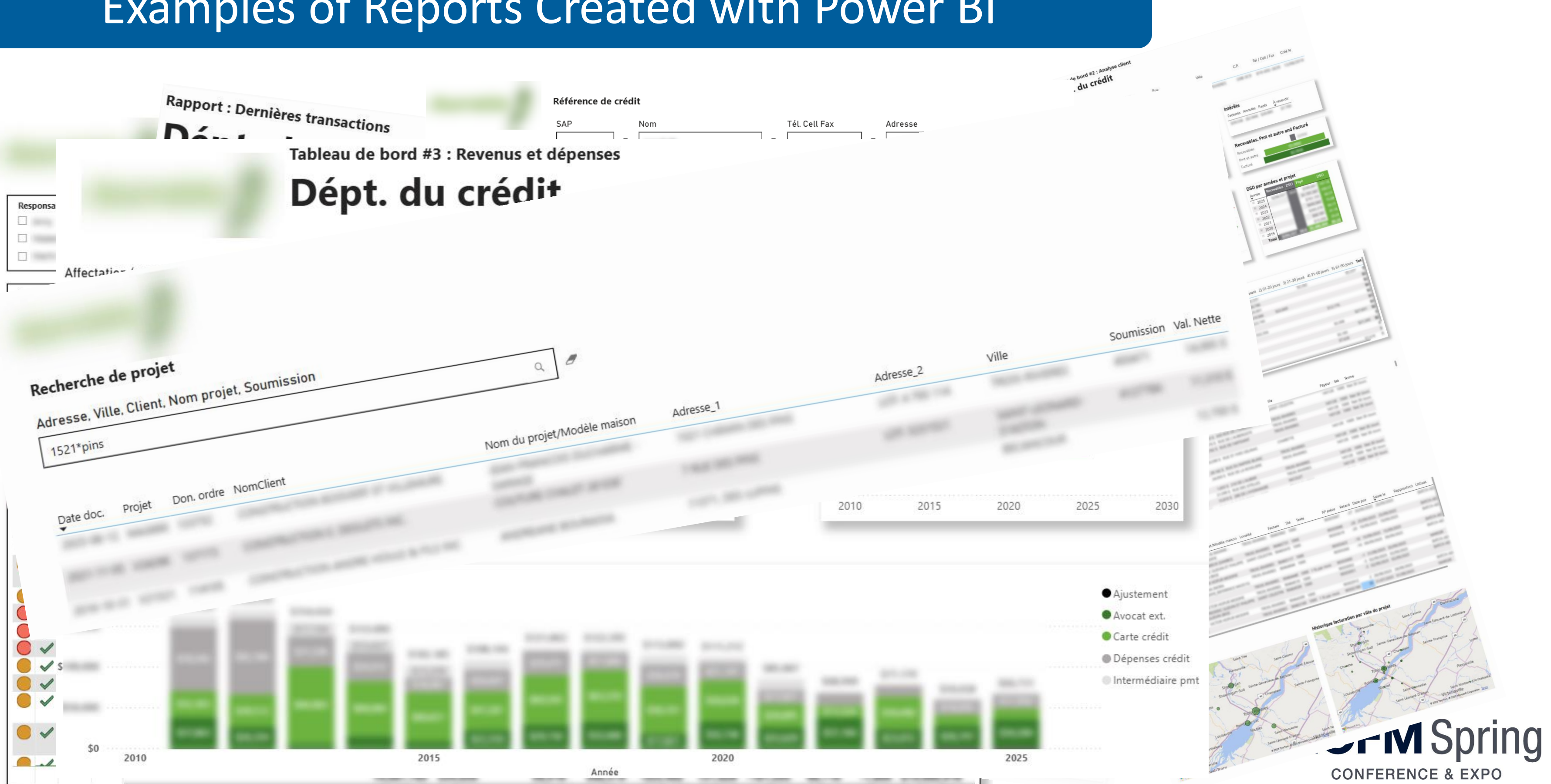
The goal is simple: **Free time**. Focus on what drives value.

# My Formula for Success



- ✓ Respect people
- ✓ Take responsibility
- ✓ Be proactive
- ✓ Keep it simple
- ✓ Focus on high-value work
- ✓ Results over excuses

# Examples of Reports Created with Power BI



# What is Power BI?

*It's a powerful data visualization tool*




*Turn your data into decisions.*

## 1. WHY IT MATTERS

-  Microsoft ecosystem
-  Easy to use
-  Real-time insights
-  Flexible visuals
-  Low cost, high value






## 2. WHAT IT DOES

-  Connects to your data  
*(Excel, SAP, SQL, etc.)*
-  Transforms and models data
-  Builds interactive dashboards



## 3. WHAT YOU GET

-  Faster decisions
-  Clear visibility
-  Actionable insights



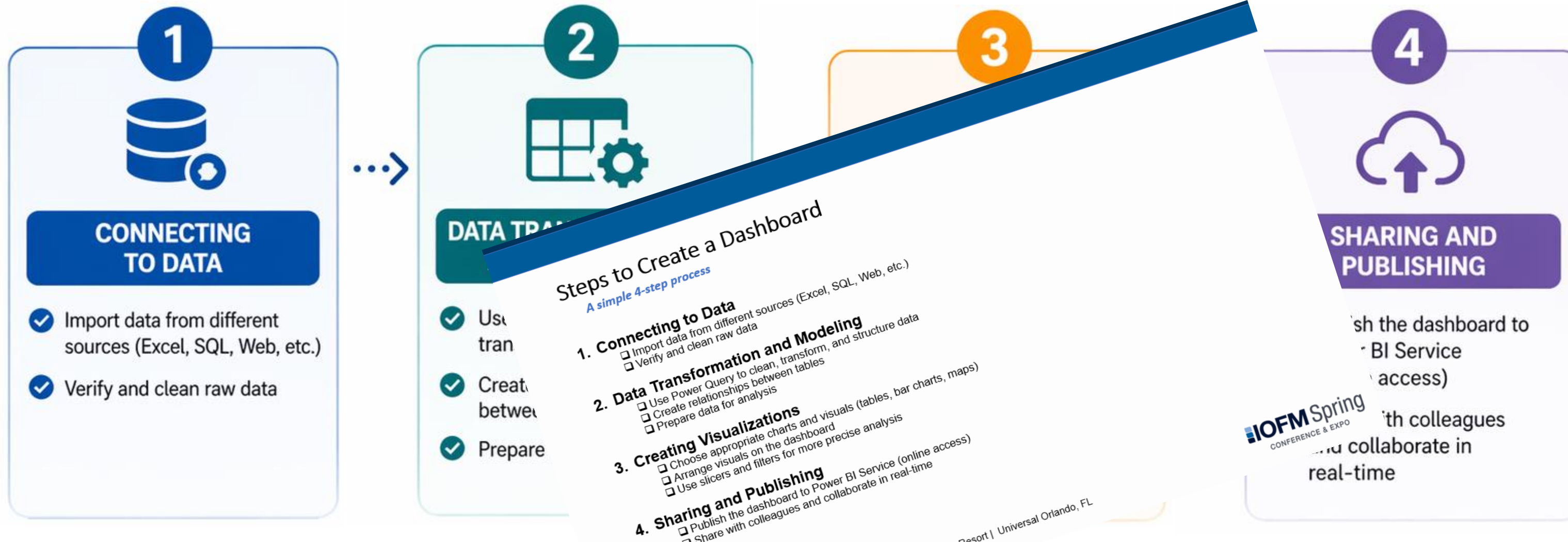
From raw data to *real impact*.



See it. Understand it. *Act on it.*

# Steps to Create a Dashboard

*A simple 4-step process*



 | From data to  Collaborate. Share. Take action.

# Beware of Common Pitfalls

*Small mistakes. Big impact.*

1



**Incorrect data relationships**

*Build the right foundation.*

2



**Check totals**

*Always validate your numbers.*

3



**Visual overload**

*Keep it simple.  
Focus on what matters.*

4



**Incorrect filtering**

*Filters drive insights.  
Use them right.*

5



**Data updates**

*Keep data fresh and reliable.*



**Good data. Clean model. Smart design. Trusted decisions.**

# LIVE DEMO



 | From data to **decisions**. Watch it in **action**.

# Lessons Learned & Key Takeaways

1



## Start small, test fast

Don't aim for perfect.  
Test simple ideas quickly, learn, adjust, and move on.

2



## Adoption beats perfection

If people don't use it, it has no value.

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 reporting.



# Please tell us what you think!

- Please scan this QR code using your mobile to access a short feedback survey →
- Also accessible via the mobile app



# QUESTIONS?

## REMINDER!

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