



# POWER BI FOR SALES WITH AI: TURNING SALES DATA INTO PREDICTIVE BUSINESS INTELLIGENCE

Duration

2 days

Time

9.00am to 5.00pm

## PROGRAMME DESCRIPTION



Power BI Desktop

In today's highly competitive and fast-paced business environment, successful sales strategies are no longer built on intuition or experience alone. Modern sales teams need to harness the power of data analytics and artificial intelligence (AI) to make timely, informed, and impactful decisions. Recognizing this critical need, this **2-day intensive, hands-on training program** is

designed to equip participants with advanced skills in **Microsoft Power BI** — fully integrated with **AI-powered tools** such as **Microsoft Copilot** and **ChatGPT** — to transform sales data into powerful business insights.

This program bridges the gap between traditional reporting and intelligent analytics by teaching participants how to design **interactive dashboards**, generate **real-time performance insights**, and develop **predictive sales models** that support strategic decision-making. Through guided, practical exercises, participants will learn to visualize key performance metrics, track customer behavior patterns, and use automation tools to generate instant reports, summaries, and actionable recommendations.

This comprehensive course empowers sales professionals, analysts, and business managers to go beyond traditional reporting — enabling them to make **data-driven, predictive, and strategic decisions** that lead to measurable business growth.

## TRAINING OBJECTIVES

By the end of the 2-day program, participants will be able to:

1. **Understand Power BI fundamentals** and its relevance to sales analytics and business intelligence.
2. **Clean, transform, and model sales data** from multiple sources for accurate reporting.
3. **Design interactive dashboards and reports** that communicate performance and trends effectively.
4. **Apply AI-powered tools** (Copilot, ChatGPT, and Power BI AI visuals) to uncover deeper business insights.
5. **Perform predictive sales forecasting** to anticipate future outcomes and guide strategic planning.
6. **Build executive-level dashboards** tailored for board and management reporting.
7. **Automate reporting processes** for continuous performance monitoring.
8. **Tell compelling data stories** that inspire confident, evidence-based decision-making.



## TRAINING OUTCOMES

Upon successful completion, participants will be able to:

- Develop **professional-grade sales dashboards** using Power BI.
- Identify **key sales drivers** and areas for improvement through AI-driven analytics.
- Accurately **forecast sales and revenue trends** using predictive modeling tools.
- Utilize **Microsoft Copilot and ChatGPT** to generate insights and recommendations instantly.
- Communicate sales results effectively to management and stakeholders through **data storytelling**.
- Automate data refresh and report distribution to **save time and enhance productivity**.
- Confidently position themselves as **data-savvy sales professionals** capable of leading digital transformation.

## TARGET PARTICIPANTS

This training is ideal for:

- Sales & Marketing Managers
- Business Development Executives
- Financial Analysts & Sales Planners
- CRM & Data Analysts
- Entrepreneurs & SME Owners
- Anyone involved in **sales analysis, forecasting, or performance reporting**

No programming background is required — only basic knowledge of Excel or sales reporting.

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## TRAINING METHODOLOGY

The program adopts a **practical, hands-on learning approach**, ensuring participants gain immediate and applicable skills.

### Methodologies include:

1. **Live Demonstrations** – Trainer-guided walkthroughs of real Power BI dashboards.
  2. **Hands-On Exercises** – Participants work on actual sales datasets to create reports and models.
  3. **Group Case Study (Sales Optimization Challenge)** – Teams analyze business data and present AI-powered recommendations.
  4. **Guided Coaching Sessions** – Step-by-step guidance from the trainer for individual dashboard creation.
  5. **Interactive Discussions** – Peer exchange and scenario-based problem solving.
  6. **AI Tool Integration Demo** – Using Microsoft Copilot and ChatGPT for automated insights and forecasting.
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### Why This Power BI for Sales with AI Training Is So Important

1. **Data is the New Currency of Sales**
    - Organizations that leverage data insights outperform competitors in conversion rate, pricing strategy, and customer retention.
    - Power BI allows sales teams to see what's happening now — and predict what will happen next.
  2. **AI Is Transforming Sales Strategy**
    - AI-powered forecasting, segmentation, and natural-language queries enable teams to make smarter, faster decisions.
    - With Copilot and ChatGPT integration, sales professionals can generate instant insights without coding.
  3. **Bridging the Gap Between Sales & Strategy**
    - This training helps sales teams align their daily activities with organizational objectives through data transparency and performance tracking.
  4. **Eliminate Manual Reporting & Errors**
    - Automated dashboards reduce dependence on static Excel reports and minimize inaccuracies.
  5. **Empower Leaders with Real-Time Visibility**
    - Executives gain immediate access to performance dashboards that highlight growth areas and risks.
  6. **Future-Proof Career Skills**
    - Power BI + AI expertise is one of the most in-demand skills across industries — mastering it positions participants as valuable assets in the digital economy.
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## DAY 1: BUILDING THE FOUNDATION FOR DATA-DRIVEN SALES INTELLIGENCE

### 9:00 am – 10:30 am | Module 1: Introduction to Power BI & Sales Analytics

- Understanding Power BI ecosystem and its business applications
  - How Power BI revolutionizes sales decision-making
  - Key sales metrics and KPIs: revenue, pipeline, conversion, average deal size, and churn
  - **Demo:** Building your first sales dashboard
  - **Activity:** Importing and visualizing a sample sales dataset
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### 10:45 am – 12:30 pm | Module 2: Data Preparation, Cleaning & Modeling for Sales Data

- Connecting multiple data sources (CRM, Excel, Google Sheets, SQL, etc.)
  - Cleaning inconsistent or missing sales data
  - Creating relationships between tables (Customers, Products, Regions, Sales Reps)
  - DAX introduction: Sales growth, target variance, and year-to-date calculations
  - **Hands-on Exercise:** Create a dynamic data model for a real sales scenario
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### 1:30 pm – 3:30 pm | Module 3: Visualizing Sales Performance Metrics

- Choosing the right visuals for sales storytelling
  - Creating trend lines, funnels, leaderboards, and customer segmentation visuals
  - Interactive filtering and drill-through features
  - **Hands-on:** Building a “Regional Sales Performance Dashboard”
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### 3:45 pm – 5:00 pm | Module 4: Executive Dashboard Design & Storytelling

- Designing **C-Level Dashboards** for performance reviews
  - Applying design best practices: clarity, layout, color psychology
  - Telling a data story — turning dashboards into decision tools
  - **Mini Project:** Transform raw visuals into an executive-level dashboard presentation
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## DAY 2: AI-POWERED INSIGHTS, FORECASTING & SALES OPTIMIZATION

### 9:00 am – 10:30 am | Module 5: Integrating AI Tools & Copilot in Power BI

- Exploring **Microsoft Copilot & ChatGPT for Power BI** insights
  - Using natural language (Q&A visuals) to ask business questions
  - AI-assisted data summarization and visualization suggestions
  - **Demo:** Generate actionable sales insights using Copilot prompts
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### 10:45 am – 12:30 pm | Module 6: Predictive Analytics & Sales Forecasting

- Understanding machine learning basics in Power BI
  - Time series forecasting, regression, and trend prediction
  - Using AI visuals (Key Influencer, Decomposition Tree) to uncover drivers of sales
  - **Hands-on:** Build a predictive sales forecast dashboard
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### 1:30 pm – 3:30 pm | Module 7: Case Study – Sales Optimization Challenge

- Participants work in groups on a **realistic business case**
  - Objective: Use Power BI + AI to identify sales issues and propose data-backed solutions
  - **Tasks:**
    - Identify underperforming sales regions
    - Predict next quarter's performance
    - Recommend data-driven actions
  - **Outcome:** Group presentation of findings to "Management Board"
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### 3:45 pm – 5:00 pm | Module 8: Automation, Reporting & Dashboard Publication

- Automating report refresh and alerts for sales KPIs
- Sharing dashboards securely via Power BI Service
- Embedding dashboards in Teams / mobile apps
- Final review and feedback session

## TRAINER PROFILE: YOGESWARAN MUNUSAMY

Yogeswaran who has obtained Bachelor of Business Administration & Master of Business Administration from University of Tun Abdul Razak.

With 19+ years of expertise in sales psychology, negotiation, and leadership, I empower businesses to close more deals, enhance customer satisfaction, and build high-performing teams. Yoges have successfully trained over 20,000 professionals across industries like B2B, B2C, Hospitality, Tech, Finance, Retail, Manufacturing, Pharmaceutical Sales, and Healthcare—driving sustainable business growth through high impact training programs.

MyA and Healthcare—driving sustainable business growth through high impact training programs. My approach integrates Neuro-Linguistic Programming (NLP), sales psychology, and experiential learning, ensuring engaging and results-driven training sessions. By combining interactive coaching, real-world case studies, and AI-powered sales tools, I equip teams with the skills to increase revenue, strengthen customer relationships, and lead with confidence.

### BUSINESS IMPACT & RESULTS

- ✚ Hospitality Sales Growth – 30% revenue growth for Light Hotel, Malaysia
- ✚ Retail Service Excellence – +15 NPS improvement in customer loyalty (Singapore-based retailer)
- ✚ B2B Negotiation Win – 25% vendor cost reduction in 6 months
- ✚ Leadership Transformation – 30% rise in employee engagement (Indonesia-based tech firm)
- ✚ Trained Over 20,000 Professionals – Across industries including B2B, B2C, Hospitality, Tech, Manufacturing, and Healthcare

## Participation Registration & Fee

Kindly email to marketing department at [mytrain2@mytrainingmalaysia.com](mailto:mytrain2@mytrainingmalaysia.com) for latest participation fees.  
The Course Fee is fully claimable under HRD Corp Claimable Courses

Course is conducted through the following method

- 1. Public. Training Series*
- 2. Exclusive In House Training Series*

Registration via online can be done thru our website at [www.eliteedge.com.my](http://www.eliteedge.com.my)

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## ORGANISED BY

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