



IBF-FTS Training/Workshop by PwC's Academy

New World, New Skills, New Ways



## Upskilling for Banking and Financial Institutions

How to analyse your data and extract  
insights that help drive efficiency &  
innovation



## **Why is it important for banking and finance professionals to upskill in data analytics?**

Data, as we know, is a key driving factor for many sectors and organisations, globally and in Singapore. An industry where it adds extreme value is one which extensively deals with capital – Banking and Finance.

Finance has a pivotal role in boosting the value and growth of a business, and applying analytics to financial data opens new avenues for in depth insights that can help organisations understand their business, the market, their performance, and growth.

A successful professional in the banking and finance sector needs to have an amalgamation of business and finance domain knowledge, as well as analytical and technical proficiencies which are both crucial and extremely rewarding for organisations in this industry.

## **About the programme**

This virtual learning workshop is designed to support today's busy finance professionals, who may not be working in the data science domain, but need to apply data analytics to understand business performance and solve business problems.

The sessions are designed to provide an in-depth understanding of techniques that can help participants solve complex financial problems through analysis of data. Each module is bite-sized and centred on a specific financial expert topic to provide concise knowledge and practical insights to transform the way you work.

The programme is conducted by the same team of PwC subject matter experts and practitioners who have extensive experience in the financial domain through advising and delivering on client engagements as well as upskilling workshops.

# New world. New skills. New ways

## Course methodology:

Attending this workshop will help participants get practical with data analysis - to build and turn insights into achievable outcomes that enable more effective decision making. We'll explore a combination of understanding what to do with your data, how to analyse it and how to create successful data visualisation and stories.

Using a combination of theory and guided exercises, with an emphasis on real world examples and case studies, we will guide the attendees on how to navigate tools such as **Alteryx**, **Power BI** and **UiPath**, which are fast becoming indispensable like email, Word and Excel, in today's digital world.

This training program will enable participants to:

- Understand the significance of data and business intelligence in the financial domain
- Design dashboards that effectively visualise data and derive insights
- Identify and automate complex business processes
- Develop workflows and automate repeatable business tasks



## Why should you attend this programme?

- Increase your ability to transform the organisation through data-driven decision making, visualisation and automation.
- Future-proof yourself, by learning tools such as Alteryx, Power BI and UiPath.
- Learn to analyse and present data in a way that gets people engaged in the story and motivated to act.
- Learn how to identify and spot insights from visualised data, with a combination of various chart types
- Learn methods to automate data cleansing and aggregation for preparation of data analytics
- Learn how to write simple robotics process automation (RPA programs to automate business processes



## Value creation for your organisation

- Future-proof your workforce, by enabling them with data skills in Alteryx, Power BI and UiPath.
- Increase in-house ability to transform the organisation.
- Improve productivity and efficiency of business processes.
- Boost employee morale and job satisfaction.
- Reduce staff attrition, and overall cost to replace employees.

## Key messages from our 23<sup>rd</sup> Annual Global CEO Survey 2020 – Singapore Report

- To upskill or not to upskill, no longer the question
- Four key forces are driving the upskilling imperative:
  - Increasing job automation
  - Decreasing talent availability (Source: OECD)
  - Decreasing mobility of skilled labour
  - Ageing talent (Source: World Bank Group)
- Singapore businesses largely either 'starting to make progress' or 'have made moderate progress' in their upskilling drive
- Over 90% of respondents said they will take any opportunity given by their employers to better understand or use technology
- 85% of respondents said they are ready to learn new skills or completely re-train to improve their future employability

# Course Outline

The training/workshop spans three modules over six learning hours – see below. (Where possible, we will share relevant use cases based on the participants' domain and business functions, subject to information provided at the point of registration.)

Organisations who have a minimum of 15 participants may email us at [sg\\_academy\\_mailbox@pwc.com](mailto:sg_academy_mailbox@pwc.com) for us to conduct a session contextualised for your industry and/or business function.

## Overview and Significance of Digital and Data

Module 1 | 2 hrs

- What to do with your data? Introduction to business intelligence.
- The power of visualisation: What makes for good data driven insights?
- How to get there: Introduction to available tools and techniques.
- Use case sharing (i.e. Product Performance Dashboard, Fixed Asset Reconciliation, Automation of Invoice Creation)
- Assessment

## Analyse Data for Intelligent Insights

Module 2 | 2 hrs

- Fast and efficient ways to prep, analyse and examine data.
- Process automation: Why it plays a key role in digital transformation.
- Introduction to Alteryx platform and how it works.
- Demo of Alteryx and UiPath: with industry use case.
- Assessment.

## Data Visualisation and Storytelling

Module 3 | 2 hrs

- Key concepts and design fundamentals for visualising data.
- Effective storytelling: How to simplify information and understand the story behind data to enable effective decision making.
- Introduction to Power BI and the right visualisation choices.
- Hands-on demo of Power BI
- Assessment

# Subject Matter Experts and Course Instructors



## **Dr. Hu Yongli**

Senior manager, PwC Singapore

Yongli is a Senior Manager in PwC's Risk Assurance Data Trust Services Team. She has nearly a decade of experience in the field of Data Science. She has participated and successfully delivered numerous Data Science projects in various industries including Healthcare, Manufacturing and Finance across the Asia Pacific region. Also, she is skilled in engaging internal and external stakeholders on the entire spectrum of Data Science activities including the conceptualization, successful execution and deployment of effective integrative descriptive, predictive and prescriptive solutions.



## **Li Yonger**

Manager, PwC Singapore

Yonger is an Manager in PwC's Data & Analytics practice with professional experience in data analysis, technology, digital transformation and automation. As the Lead Trainer of PwC's own "Digital Upskilling" program in Singapore, she is responsible for designing and extending the digital training agenda for the firm and for external organisations. She has personally trained over 300 PwC Singapore staff on automation and data-driven insights. She has also involved in designing and developing solution to automate the audit of over hundreds of funds for Asset Wealth Management practise.



