Training course on Power BI/Tableau for Real Estate Business Intelligence

Professional Development Training Course Outline

Category	Real Estate Institute	**Duration**	10 Days
Base Fee	$3,000 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today's data-intensive real estate market, Business Intelligence (BI) tools like Microsoft Power BI and Tableau have become indispensable for transforming raw, disparate data into actionable insights that drive competitive advantage and strategic decision-making. Traditional spreadsheets often fall short in handling the volume, variety, and velocity of real estate data, making it challenging to extract meaningful patterns, identify opportunities, and mitigate risks. Power BI and Tableau empower real estate professionals to create dynamic, interactive dashboards and reports that provide a comprehensive, real-time view of market trends, property performance, financial health, and client engagement. In Nairobi, Kenya, where the real estate landscape is complex and evolving, with opportunities ranging from residential developments to commercial leases and affordable housing, leveraging these BI tools is crucial for making informed choices amidst market fluctuations and competitive pressures. Training Course on Power BI/Tableau for Real Estate Business Intelligence is meticulously designed to equip with the expert-level skills. This specialized program focuses on practical, hands-on application of both tools, emphasizing data modeling, advanced visualization techniques, dashboard design principles, and automated reporting workflows, blending in-depth knowledge of real estate specific KPIs, data integration strategies, and the art of data storytelling, and the leveraging of interactive dashboards and geospatial mapping to unlock profound insights and drive superior financial and operational outcomes across all real estate asset classes. This comprehensive 10-day program delves into nuanced methodologies for connecting to diverse real estate data sources (e.g., CRM, property management systems, financial databases, market data APIs, web-scraped data from Kenyan property portals), mastering advanced techniques for data cleaning, transformation, and modeling (e.g., using Power Query in Power BI, or data preparation in Tableau Desktop), and exploring cutting-edge approaches to building interactive, drill-down dashboards that visualize key real estate metrics, conducting in-depth market analysis, and generating automated reports for various stakeholders. A significant focus will be placed on understanding the interplay of various real estate business functions (e.g., sales, leasing, property management, investment analysis), the specific reporting needs of different user roles, and the application of Power BI/Tableau to local Kenyan real estate market scenarios (e.g., visualizing rental yields by sub-market in Nairobi, analyzing property sales trends in different counties, tracking occupancy rates for commercial properties, or monitoring the performance of a real estate development project). By integrating

global industry best practices in business intelligence, analyzing **real-world examples of impactful real estate dashboards and reports (including those tailored for the Kenyan context), and engaging in intensive hands-on data modeling exercises, dashboard creation workshops, report automation drills, and expert-led discussions, attendees will develop the strategic acumen to confidently transform raw real estate data into persuasive visual narratives, fostering unparalleled clarity, efficiency, and data-driven confidence in their professional roles, thereby securing their position as indispensable leaders in driving informed decisions and delivering superior results in the competitive real estate market.

Programme Curriculum

Training Course on Power BI/Tableau for Real Estate Business Intelligence

Introduction:

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This comprehensive 10-day program delves into **nuanced methodologies** for **connecting to diverse real estate data sources (e.g., CRM, property management systems, financial databases, market data APIs, web-scraped data from Kenyan property portals),** mastering **advanced techniques for data cleaning, transformation, and modeling (e.g., using Power Query in Power BI, or data preparation in Tableau Desktop)**, and exploring **cutting-edge approaches** to **building interactive, drill-down dashboards that visualize key real estate metrics, conducting in-depth market analysis, and generating automated reports for various stakeholders.** A significant focus will be placed on understanding the interplay of **various real estate business functions (e.g., sales, leasing, property management, investment analysis), the specific reporting needs of different user roles, and the application of Power BI/Tableau to local Kenyan real estate market scenarios (e.g., visualizing rental yields by sub-market in Nairobi, analyzing property sales trends in different counties, tracking occupancy rates for commercial properties, or monitoring the performance of a real estate development project).** By integrating **global industry best practices in business intelligence,** analyzing **real-world examples of impactful real estate dashboards and reports (including those tailored for the Kenyan context), and engaging in intensive hands-on **data modeling exercises, dashboard creation workshops, report automation drills, and expert-led discussions**, attendees will develop the **strategic acumen** to confidently transform raw real estate data into persuasive

visual narratives, fostering unparalleled **clarity, efficiency, and data-driven confidence** in their professional roles, thereby securing their position as indispensable leaders in **driving informed decisions and delivering superior results in the competitive real estate market.**

Course Objectives

Upon completion of this course, participants will be able to:

1. **Analyze core principles and strategic responsibilities** of **Business Intelligence (BI) in the real estate industry**.
2. **Master sophisticated techniques** for **connecting to, cleaning, and transforming diverse real estate data sources** using Power BI and Tableau.
3. **Develop robust data models** that efficiently support complex real estate analyses and visualizations in both platforms.
4. **Implement effective design principles** for **creating intuitive, interactive, and visually compelling real estate dashboards**.
5. **Manage complex real estate data flows** and ensure data accuracy and consistency within BI tools.
6. **Apply robust strategies** for **calculating and visualizing key real estate performance indicators (KPIs)** such as NOI, occupancy rates, IRR, and Cap Rates.
7. **Understand the deep integration of geospatial analysis** for location-based insights and property mapping in Power BI and Tableau.
8. **Leverage knowledge of advanced charting techniques** to communicate specific real estate insights effectively (e.g., waterfall charts for cash flow, Gantt charts for project timelines).
9. **Optimize strategies for automating reports** and distributing interactive dashboards to various real estate stakeholders.
10. **Formulate specialized BI solutions** for **different real estate functions** (e.g., investment analysis, sales performance, property management, development tracking).
11. **Conduct advanced market analysis and trend forecasting** using Power BI and Tableau's analytical capabilities.
12. **Navigate challenging situations** such as **large datasets, data governance issues, and tailoring BI solutions for diverse user needs**.
13. **Develop a holistic, practical, and data-driven approach** to **real estate business intelligence, with a focus on maximizing local market opportunities in Kenya and globally using Power BI and Tableau.**

Target Audience

This course is designed for real estate professionals interested in Power BI/Tableau for Business Intelligence:

1. **Real Estate Analysts & Researchers:** Seeking to create dynamic reports and uncover deeper insights.
2. **Real Estate Investors & Fund Managers:** Monitoring portfolio performance, conducting due diligence, and evaluating new opportunities.
3. **Real Estate Developers:** Tracking project progress, sales velocity, and financial performance.
4. **Asset & Property Managers:** Optimizing operational efficiency, tenant satisfaction, and financial outcomes.
5. **Real Estate Brokers & Agents:** Analyzing market trends, presenting data to clients, and tracking sales performance.
6. **Corporate Real Estate Executives:** Gaining a holistic view of their organization's real estate footprint and strategy.
7. **Financial Analysts in Real Estate:** Building sophisticated financial performance dashboards.

8. **Anyone involved in real estate** who needs to harness the power of data for strategic decision-making and compelling presentations.

Course Duration: 10 Days

Course Modules

- **Module 1: Introduction to Business Intelligence in Real Estate**
  - **The Power of BI**: Bridging the gap between raw data and actionable insights.
  - **Real Estate BI Landscape**: Common data sources, challenges, and opportunities in Kenya.
  - **Introduction to Power BI and Tableau**: Key features, use cases, and industry position.
  - **BI Project Lifecycle**: From data collection to dashboard deployment.
  - **Key Real Estate KPIs for BI**: Occupancy Rate, NOI, Cap Rate, IRR, Loan-to-Value, Sales Volume, Lease-Up Pace, etc.
  - **Case Study**: Examining how leading global and local Kenyan real estate firms leverage BI for competitive advantage, referencing success stories or challenges in data adoption.
- **Module 2: Data Connection & Transformation (Power BI)**
  - **Power Query Editor Mastery**: Connecting to diverse data sources (Excel, CSV, Databases, Web, APIs, e.g., KNBS, PropertyDataKenya.com, local listing portals).
  - **Data Cleaning Techniques**: Handling missing values, duplicates, errors.
  - **Data Transformation**: Unpivoting, transposing, merging, appending queries.
  - **Creating Custom Columns & Conditional Logic** for real estate specific calculations.
  - **Data Type Management & Best Practices**.
  - **Case Study**: Importing and cleaning raw property transaction data or rental listings from a Kenyan real estate portal or open government data source, addressing common data quality issues.
- **Module 3: Data Modeling & DAX Fundamentals (Power BI)**
  - **Relational Database Concepts**: Tables, relationships (one-to-many, many-to-many).
  - **Designing an Effective Data Model**: Star schema, snowflake schema for real estate data.
  - **DAX (Data Analysis Expressions) Basics**: Measures vs. Calculated Columns.
  - **Key DAX Functions for Real Estate**: SUMX, CALCULATE, RELATED, ALL, FILTER.
  - **Time Intelligence Functions**: YTD, QTD, Period-over-Period analysis for real estate performance.
  - **Case Study**: Building a robust data model for a real estate portfolio, linking property details, lease agreements, and financial transactions specific to Kenyan property types (e.g., apartments, townhouses, commercial spaces).
- **Module 4: Building Interactive Dashboards (Power BI)**
  - **Visualization Best Practices**: Choosing the right visual for the message, design principles.
  - **Core Power BI Visuals for Real Estate**: Bar charts, line charts, cards, tables, matrices, slicers.
  - **Creating Drill-Through and Sync Slicers**: Enabling deeper data exploration.
  - **Interactivity & User Experience (UX) Design**: Bookmarks, buttons, tooltips.
  - **Conditional Formatting & Custom Visuals**.
  - **Case Study**: Developing an interactive dashboard for sales performance of a residential development or commercial leasing activity in a specific Nairobi sub-market (e.g., Kilimani, Westlands).
- **Module 5: Data Connection & Preparation (Tableau)**
  - **Tableau Desktop Interface**: Connecting to data, data pane, shelves.
  - **Connecting to Real Estate Data**: Flat files, databases, cloud data sources relevant to Kenya.
  - **Data Interpreter & Data Prep in Tableau**: Cleaning and shaping data.
  - **Joins, Blends, and Unions**: Combining disparate real estate datasets.

    - **Extracts vs. Live Connections**: Optimizing performance.
    - **Case Study**: Connecting Tableau to a dataset of commercial property leases or land transactions in Kenya and preparing it for multi-faceted analysis.
- **Module 6: Visualizations & Calculations (Tableau)**
    - **Pill Types & Aggregations**: Dimensions, Measures, Continuous, Discrete.
    - **Creating Standard Charts**: Bar, line, scatter, pie, text tables.
    - **Calculated Fields**: Custom metrics for real estate (e.g., vacancy rate, average rent per sqft in Nairobi).
    - **Table Calculations**: Year-over-year growth, running sums for trends.
    - **Level of Detail (LOD) Expressions**: Advanced aggregations for complex real estate scenarios.
    - **Case Study**: Visualizing market trends like average property prices and rental yields across different neighborhoods in Nairobi and other key Kenyan cities.
- **Module 7: Designing Compelling Dashboards (Tableau)**
    - **Dashboard Layouts & Design Principles**: Storytelling with data.
    - **Filters, Parameters, and Actions**: Adding interactivity to dashboards.
    - **Dashboard Objects**: Text, images, web pages, layout containers.
    - **Creating Stories in Tableau**: Guiding the audience through insights.
    - **Best Practices for Dashboard Performance & User Adoption**.
    - **Case Study**: Building a comprehensive property portfolio performance dashboard in Tableau, highlighting occupancy, income, and expense trends for a mixed-use development.
- **Module 8: Geospatial Analytics for Real Estate (Power BI & Tableau)**
    - **Mapping Concepts**: Geocoding, polygons, points, understanding Kenyan administrative boundaries.
    - **Integrating Location Data**: Latitude/Longitude, city, county, postal codes.
    - **Creating Map Visuals**: Filled maps, symbol maps, heat maps (e.g., showing property density or price per square meter in different Nairobi sub-regions).
    - **Demographic & Economic Overlay**: Analyzing property values in relation to population, income, infrastructure (e.g., proximity to SGR stations, major roads).
    - **Introduction to Custom Map Layers (e.g., GeoJSON for sub-counties in Kenya)**.
    - **Case Study**: Visualizing real estate investment opportunities on a map of Kenya, overlaying market data with demographic and infrastructure information.
- **Module 9: Advanced BI Applications for Real Estate**
    - **Sales & Leasing Performance Dashboards**: Lead conversion, agent productivity, lease expirations.
    - **Property Management Analytics**: Maintenance costs, tenant churn, service request analysis.
    - **Investment & Valuation Dashboards**Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	04 Dec 2026	Online	$2,000
23 Nov 2026	04 Dec 2026	Physical	$3,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$6,000

Start Date	End Date	Location	Price
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$9,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$12,000

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