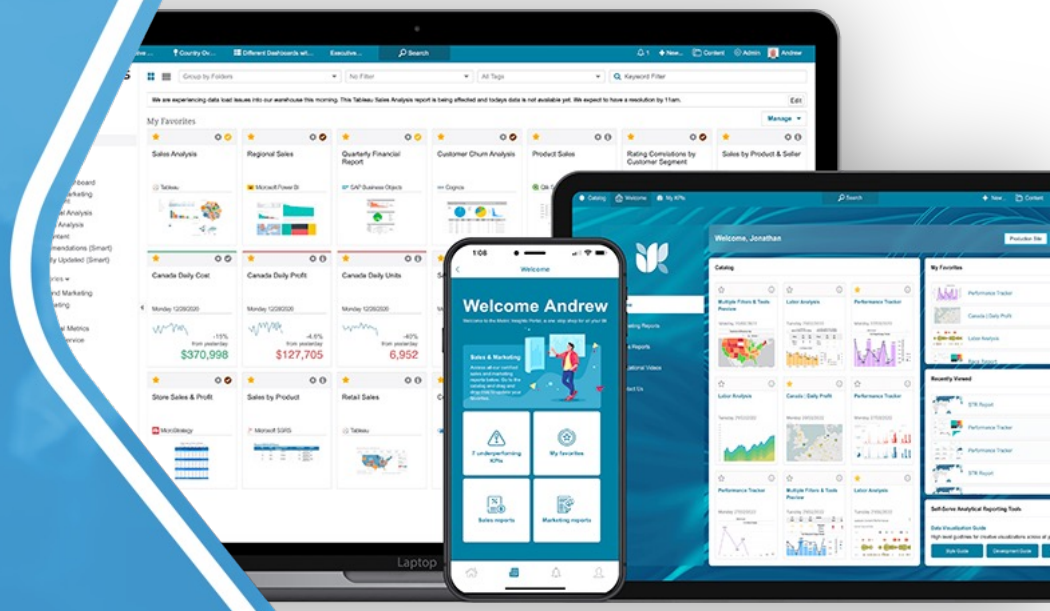
LIVE WEBINAR

BEYOND THE HYPE
THE REAL IMPACT OF AI ON BI

MARIUS MOSCOVICI
FOUNDER & CEO

MIKE SMITHEMAN
VP SALES & MARKETING



METRIC INSIGHTS
ENTERPRISE BUSINESS INTELLIGENCE PORTAL

THE UN-FULFILLED PROMISE
OF **SELF-SERVICE BI...**

THE **BI USER JOURNEY** TODAY

THE **BI USER JOURNEY** TODAY

1. Discover

Find the right report

THE **BI USER JOURNEY** TODAY

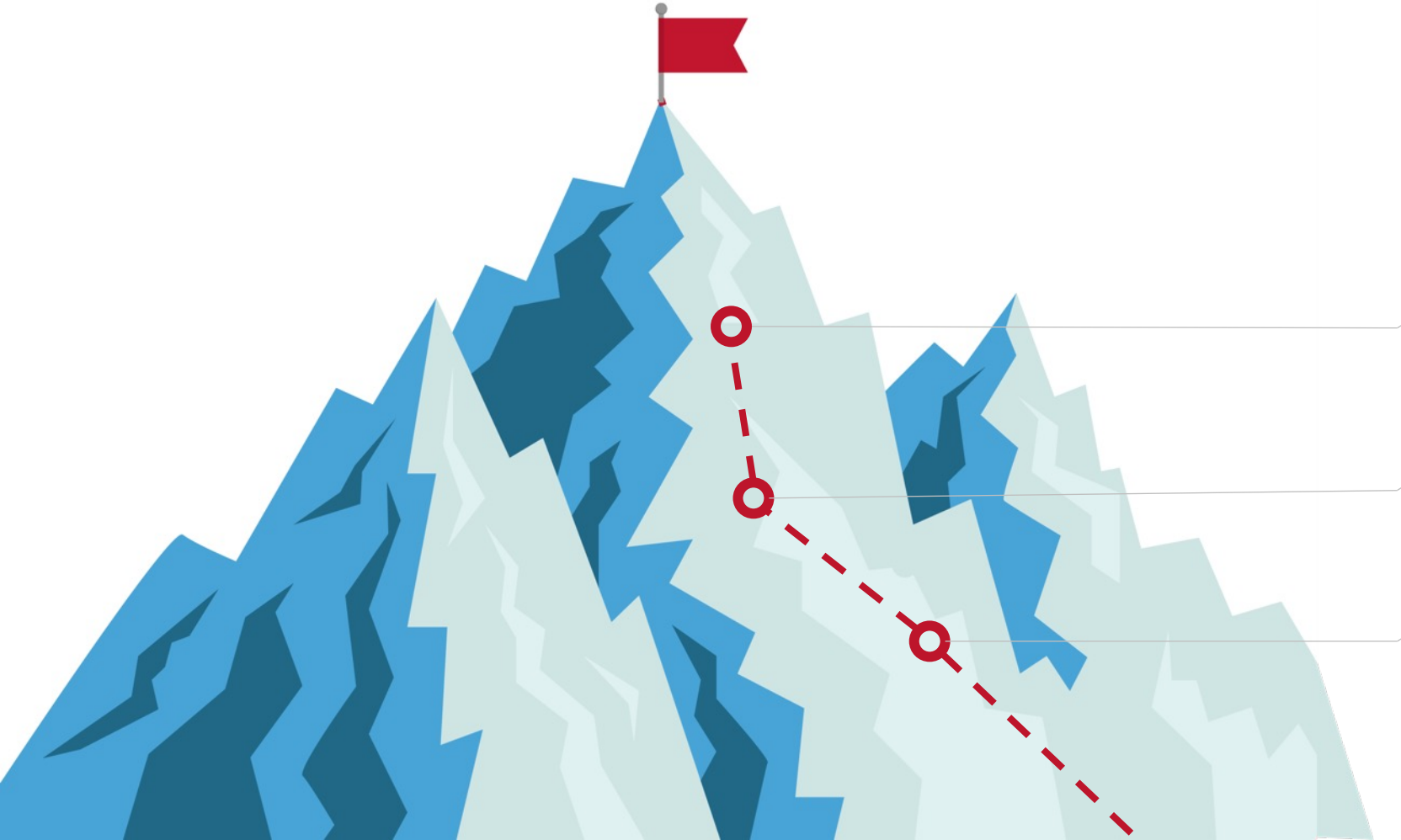
2. Understand

Know what it's telling you

1. Discover

Find the right report

THE **BI USER JOURNEY** TODAY

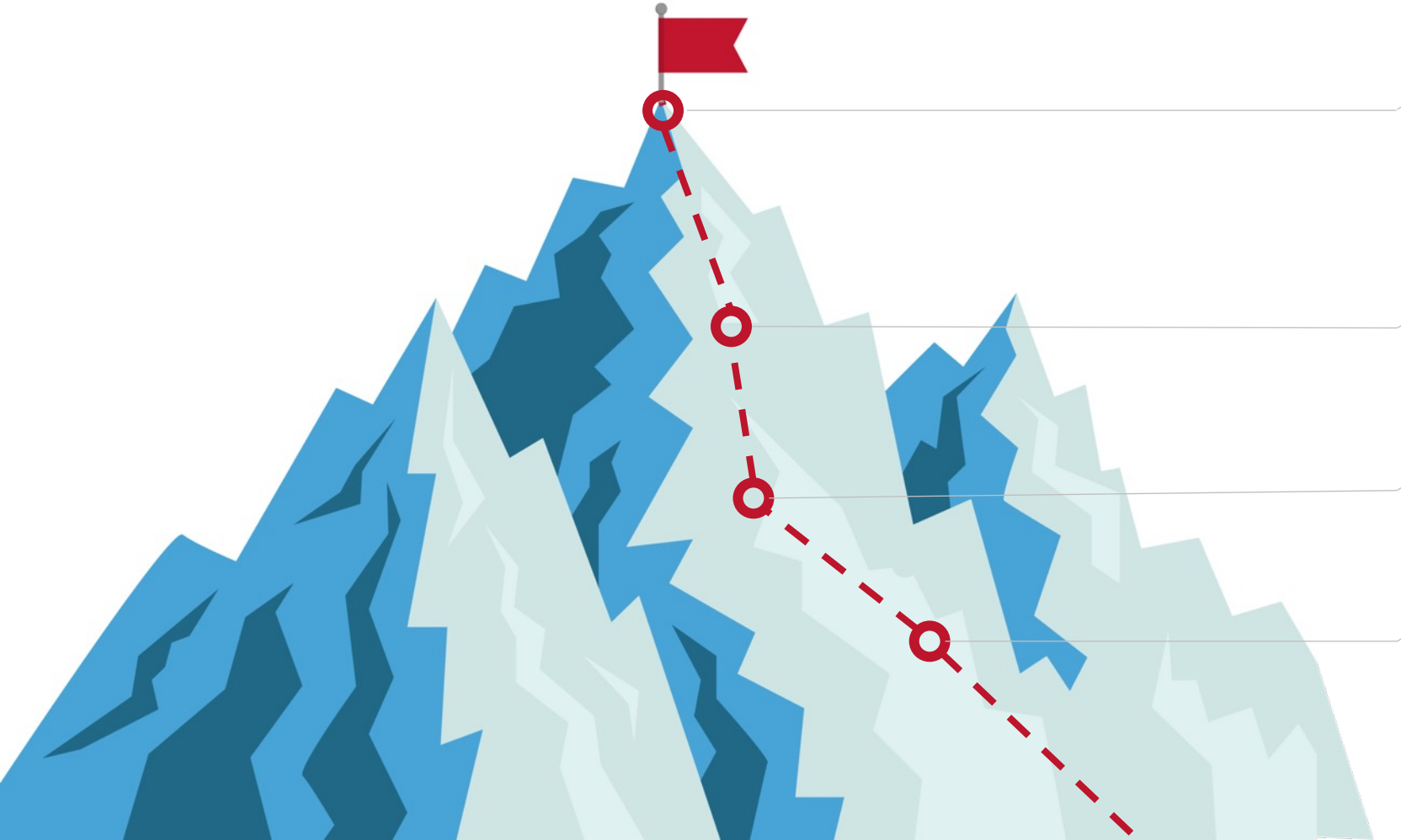


3. Analyze
Dive into the data

2. Understand
Know what it's telling you

1. Discover
Find the right report

THE **BI USER JOURNEY** TODAY



Answer your questions

3. Analyze
Dive into the data

2. Understand
Know what it's telling you

1. Discover
Find the right report

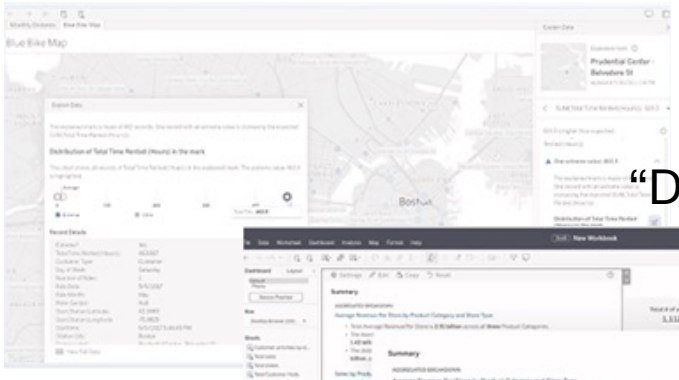
IF USERS STRUGGLE AT ANY STEP, THEY

CALL AN ANALYST

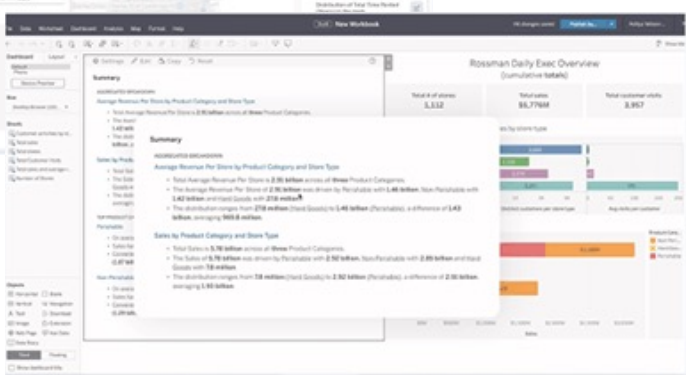
How is **AI** helping with each of these stages today…

THE ROLE OF AI IN **BI TOOLS** TODAY

“Explain Data”

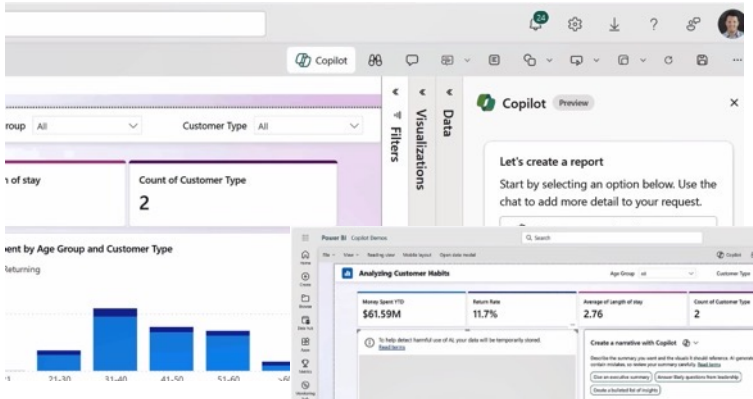


“Data Stories”

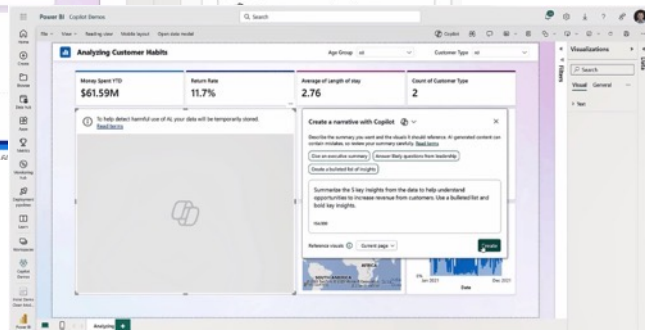


+ableau from Salesforce

”Fabric”



”Copilot”



Power BI

HOW DO USERS GET TO **CAMP 3?**

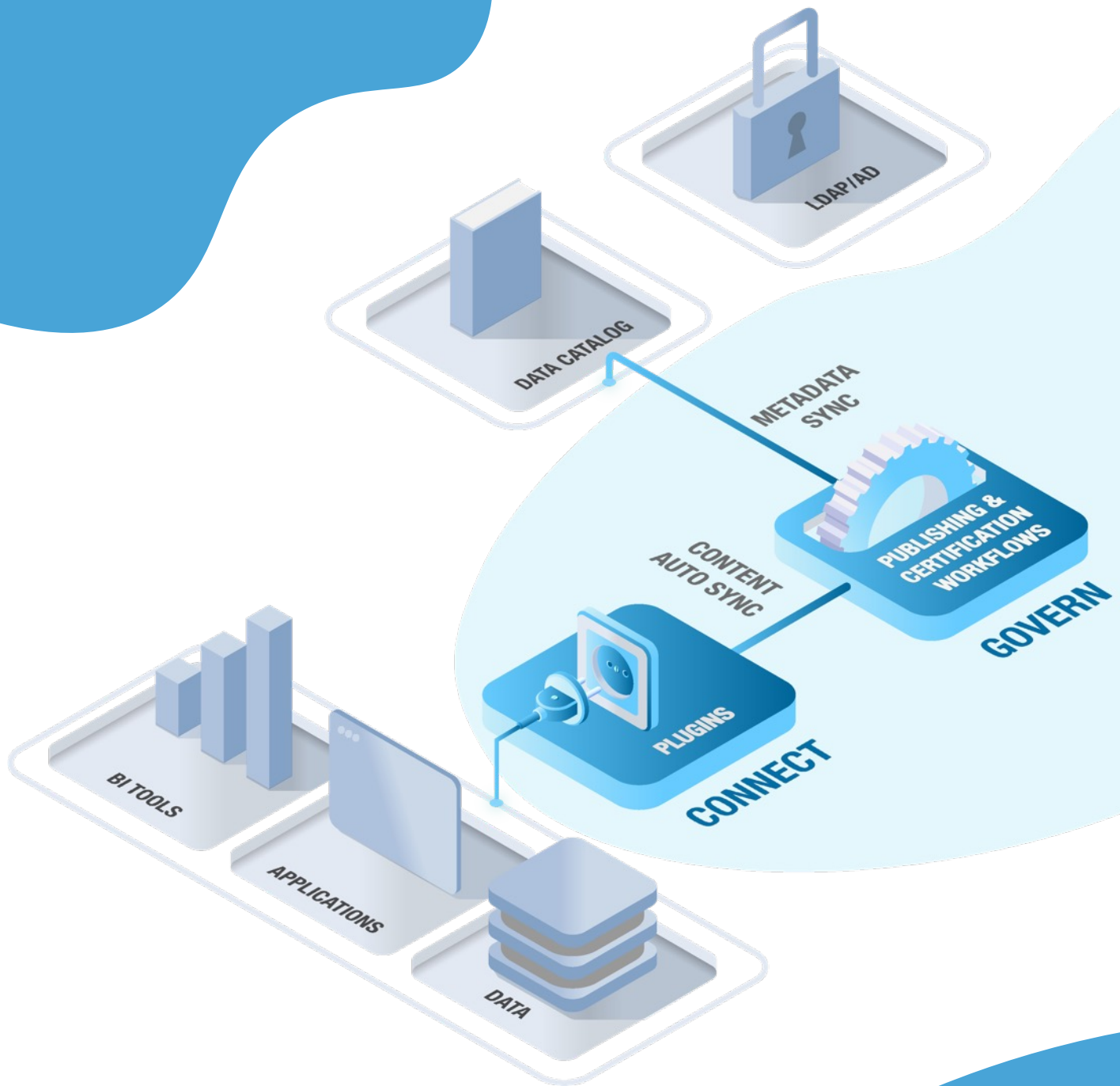
A BUSINESS INTELLIGENCE PORTAL

ENTERPRISE BI PORTAL

One place to govern and discover BI

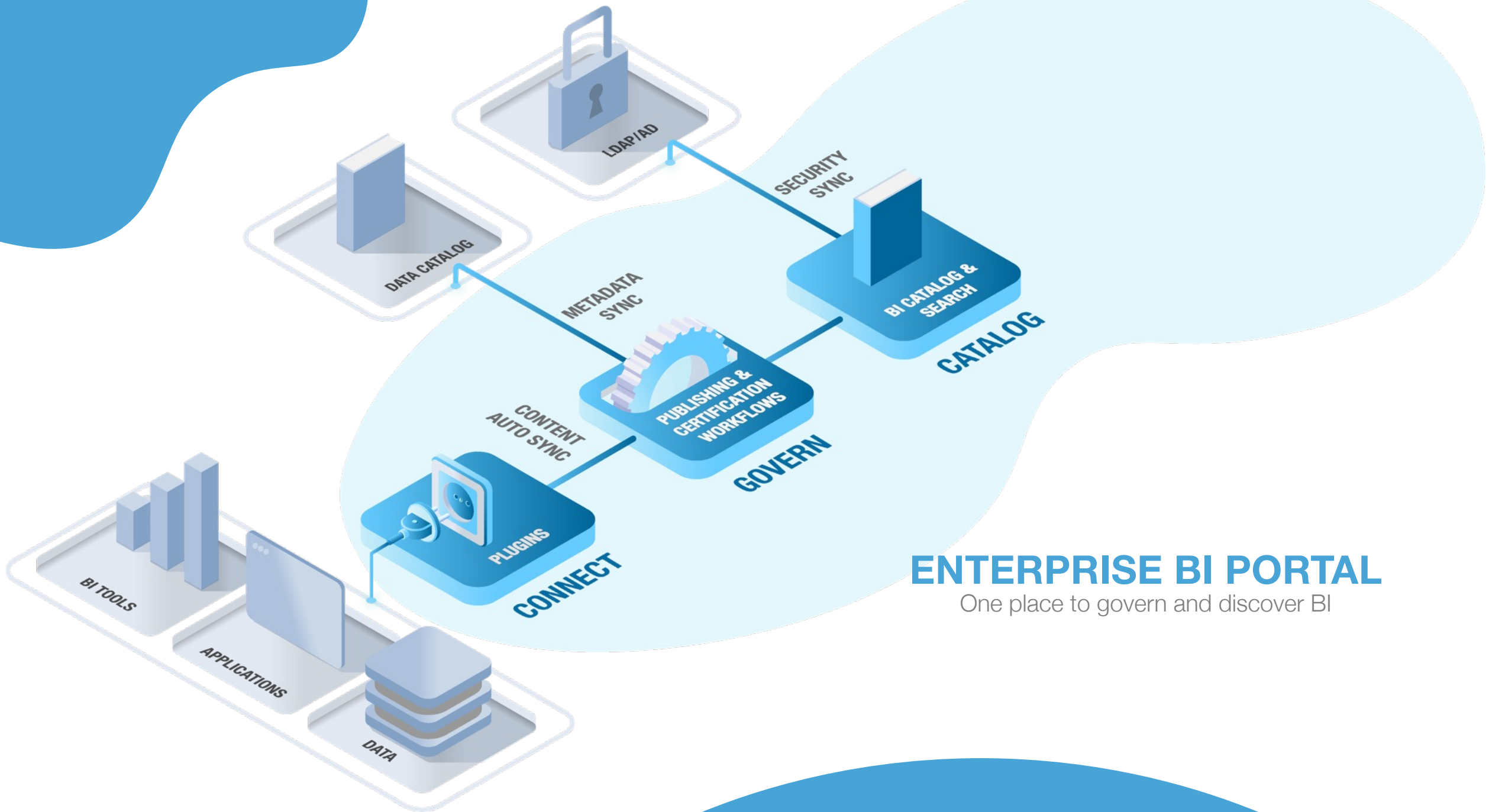
ENTERPRISE BI PORTAL

One place to govern and discover BI



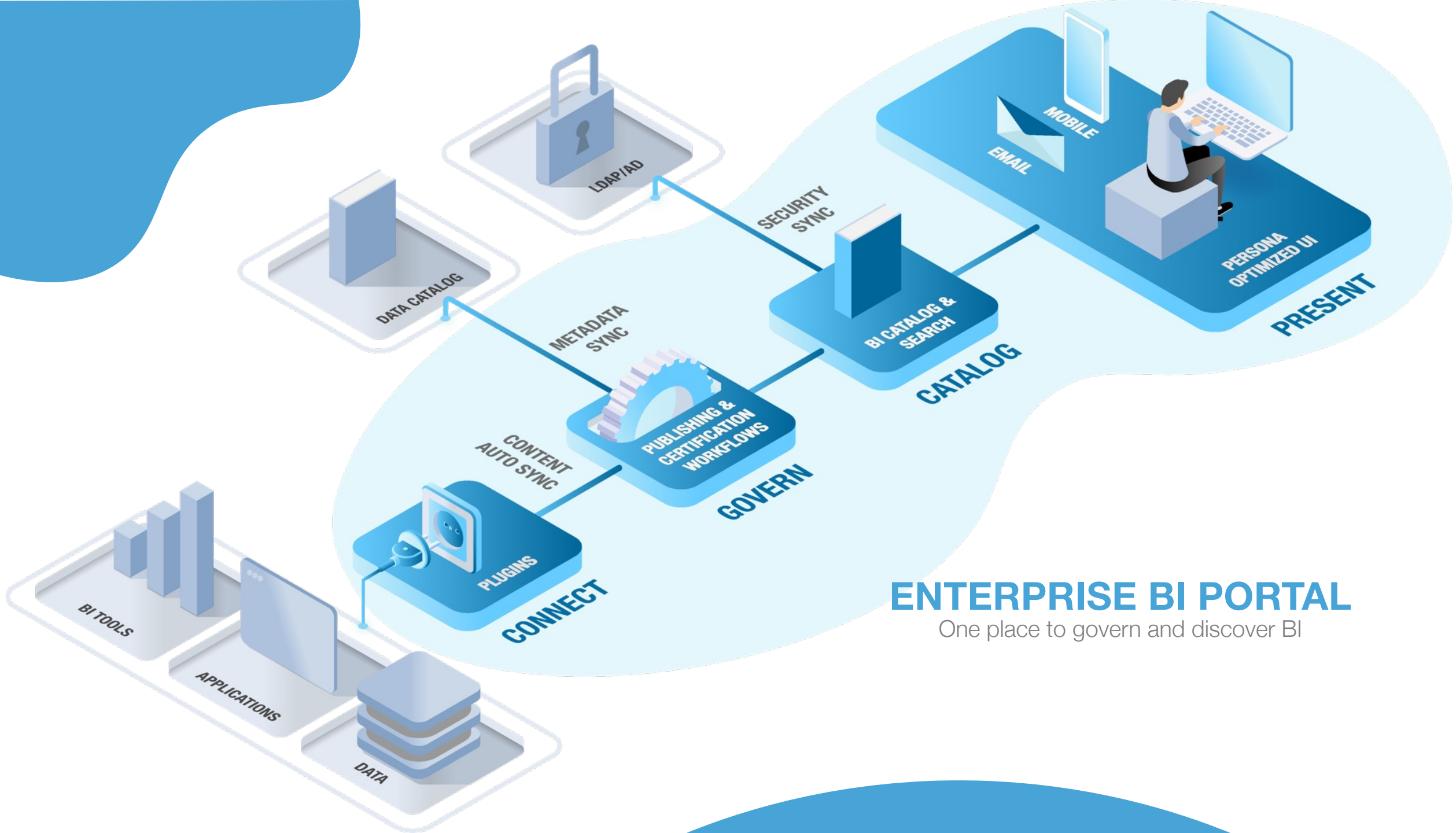
ENTERPRISE BI PORTAL

One place to govern and discover BI



ENTERPRISE BI PORTAL

One place to govern and discover BI

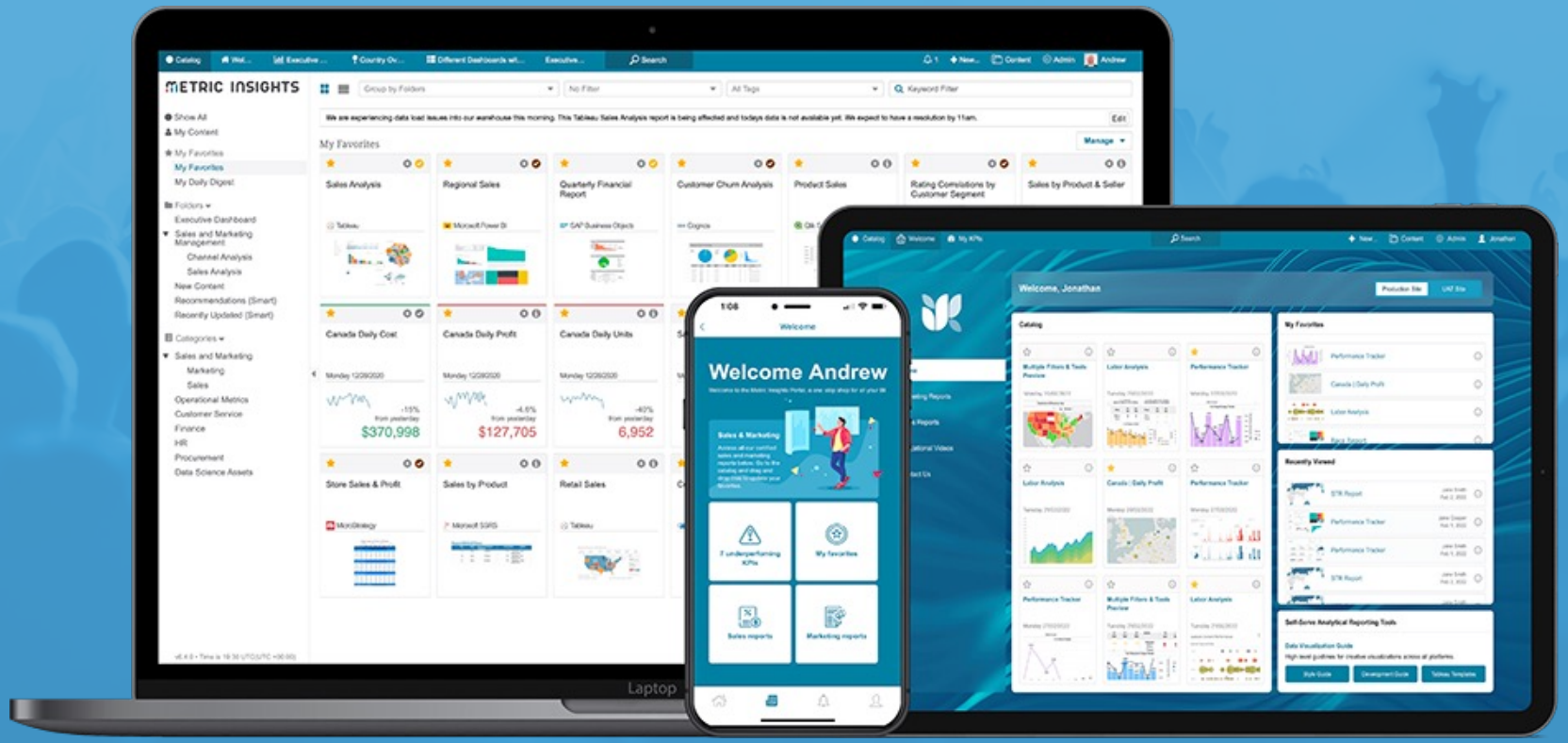


ENTERPRISE BI PORTAL

One place to govern and discover BI

METRIC INSIGHTS

ENTERPRISE BI PORTAL DEMO



Give your data the audience it deserves

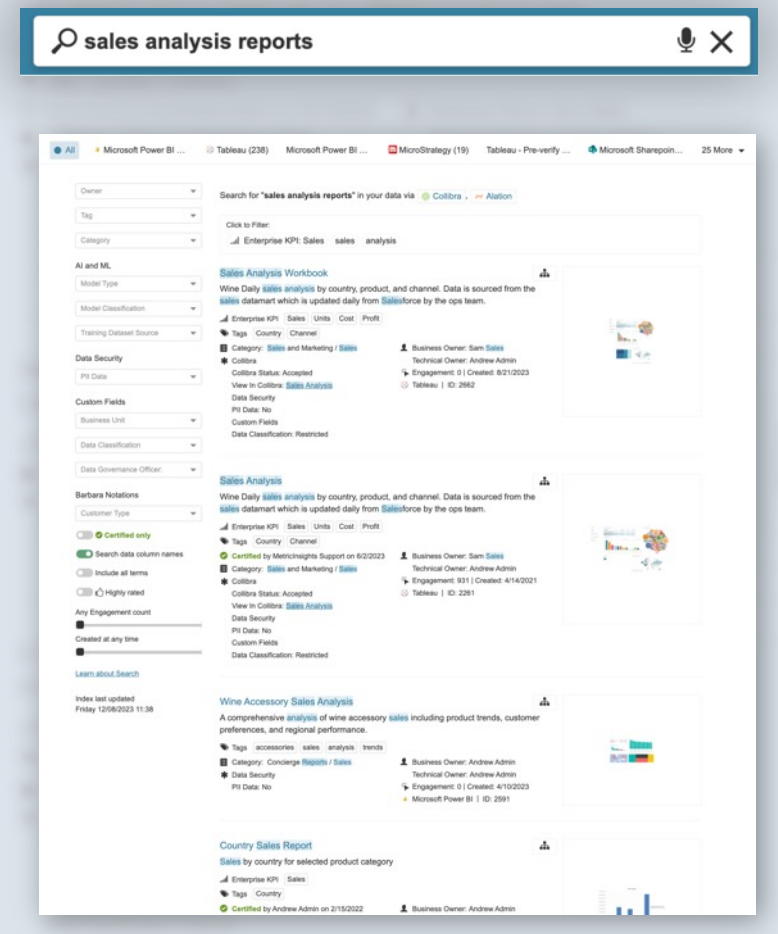
© Metric Insights 2023

HOW DOES AI ENHANCE THE PORTAL EXPERIENCE TODAY?

BI **SEARCH**

Optimized for quick access

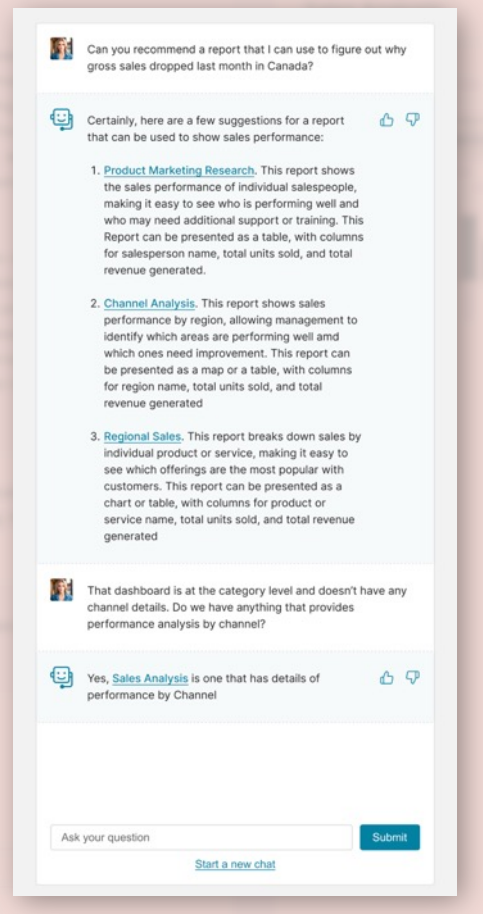
Quickly find assets that you know already exist



BI **CONCIERGE**

Optimized for discovery

Discover the best assets to answer the questions you have



METRIC INSIGHTS

BI CONCIERGE

powered by **AI**

Key Features

- LLM powered conversational chat
- Leverages all metadata collected by Metric Insights
- Leverages Metric Insights Security model
- Integrated with Actions (e.g. subscribe, setup an alert)
- Accessible via Metric Insights BI Portal
- Accessible via Slack and Microsoft Teams

Benefits

- Save users time by recommending the best report
- Improve analyst productivity
- Increase user engagement with BI

© Metric Insights 2023

WHAT IS THE FUTURE OF AI FOR THE PORTAL?

Catalog | BI Concierge - Powered by GPT | Search | New | Content | Kasey

Can you recommend a report that I can use to figure out why gross sales dropped last month in Canada?

Certainly, here are a few suggestions for a report that can be used to show sales performance:

1. Product Marketing Research. This report shows the sales performance of individual salespeople, making it easy to see who is performing well and who may need additional support or training. This Report can be presented as a table, with columns for salesperson name, total units sold, and total revenue generated.

2. Channel Analysis. This report shows sales performance by region, allowing management to identify which areas are performing well amd which ones need improvement. This report can be presented as a map or a table, with columns for region name, total units sold, and total revenue generated

3. Regional Sales. This report breaks down sales by individual product or service, making it easy to see which offerings are the most popular with customers. This report can be presented as a chart or table, with columns for product or service name, total units sold, and total revenue generated

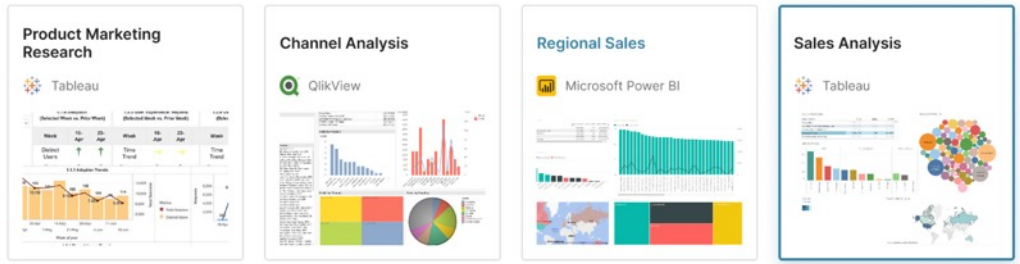
That dashboard is at the category level and doesn't have any channel details. Do we have anything that provides performance analysis by channel?

Yes, Sales Analysis is one that has details of performance by Channel

Ask your question

Submit

Start a new chat



Sales Analysis

Andrew Admin on 10/13/2022

Enterprise KPI	Sales, Cost, Profit, Units
Tags	Country, Channel
Business Owner	Sam Sales
Data Steward	Gary Governor
Technical Owner	Andrew Admin
Element ID	2261

Wine Daily sales analysis by country, product, and channel. Data is sourced from the sales datamart which is updated daily from Salesforce by the ops team.

Image Last Taken	Apr 13, 2023 3:06
Image Last Taken	Jul 28, 2022 21:57
Engagement	936
Collibra	
Collibra Status	Accepted
View In Collibra	Sales Analysis
Data Security	
PII Data	No

Catalog | BI Concierge - Powered by GPT | Search | New | Content | Kasey

Can you recommend a report that I can use to figure out why gross sales dropped last month in Canada?

Certainly, here are a few suggestions for a report that can be used to show sales performance:

1. Product Marketing Research. This report shows the sales performance of individual salespeople, making it easy to see who is performing well and who may need additional support or training. This Report can be presented as a table, with columns for salesperson name, total units sold, and total revenue generated.

2. Channel Analysis. This report shows sales performance by region, allowing management to identify which areas are performing well amd which ones need improvement. This report can be presented as a map or a table, with columns for region name, total units sold, and total revenue generated

3. Regional Sales. This report breaks down sales by individual product or service, making it easy to see which offerings are the most popular with customers. This report can be presented as a chart or table, with columns for product or service name, total units sold, and total revenue generated

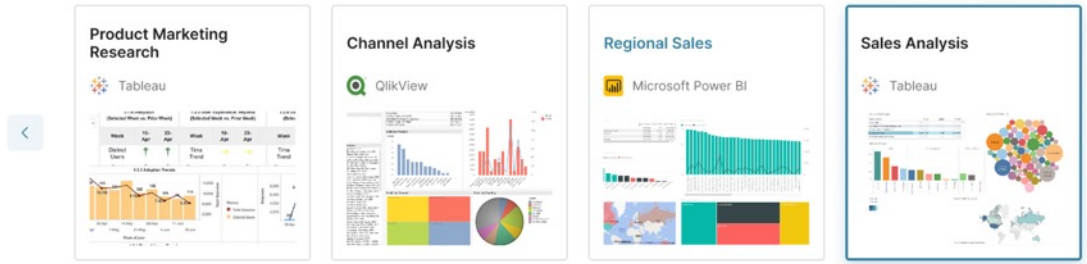
That dashboard is at the category level and doesn't have any channel details. Do we have anything that provides performance analysis by channel?

Yes, Sales Analysis is one that has details of performance by Channel

Ask your question

Submit

Start a new chat



Sales Analysis

Subscribe me
Share with another user
Setup an alert

Andrew Admin on 10/13/202

Enterprise KPI	Sale
Tags	Country, Channel
Business Owner	Sam Sales
Data Steward	Gary Governor
Technical Owner	Andrew Admin
Element ID	2261

Wine Daily sales analysis by country, product, and channel. Data is sourced from the sales datamart which is updated daily from Salesforce by the ops team.

Image Last Taken	Apr 13, 2023 3:06
Image Last Taken	Jul 28, 2022 21:57
Engagement	936
Collibra	
Collibra Status	Accepted
View In Collibra	Sales Analysis
Data Security	
PII Data	No

Catalog | BI Concierge - Powered by GPT | Search | New | Content | Kasey

Certainly, here are a few suggestions for a report that can be used to show sales performance:

1. Product Marketing Research. This report shows the sales performance of individual salespeople, making it easy to see who is performing well and who may need additional support or training. This Report can be presented as a table, with columns for salesperson name, total units sold, and total revenue generated.

2. Channel Analysis. This report shows sales performance by region, allowing management to identify which areas are performing well amd which ones need improvement. This report can be presented as a map or a table, with columns for region name, total units sold, and total revenue generated

3. Regional Sales. This report breaks down sales by individual product or service, making it easy to see which offerings are the most popular with customers. This report can be presented as a chart or table, with columns for product or service name, total units sold, and total revenue generated

That dashboard is at the category level and doesn't have any channel details. Do we have anything that provides performance analysis by channel?

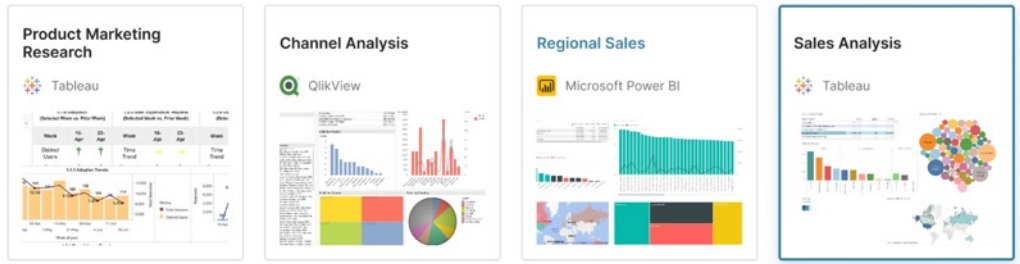
Yes, Sales Analysis is one that has details of performance by Channel

Subscribe me

Do you want me to include Sales Analysis in your Weekly Reporting Digest which you receive every Friday at 8AM?

Ask your question | Submit

Start a new chat



Sales Analysis

Andrew Admin on 10/13/2022

Enterprise KPI	Sales, Cost, Profit, Units
Tags	Country, Channel
Business Owner	Sam Sales
Data Steward	Gary Governor
Technical Owner	Andrew Admin
Element ID	2261

Wine Daily sales analysis by country, product, and channel. Data is sourced from the sales datamart which is updated daily from Salesforce by the ops team.

Image Last Taken	Apr 13, 2023 3:06
Image Last Taken	Jul 28, 2022 21:57
Engagement	936
Collibra	
Collibra Status	Accepted
View In Collibra	Sales Analysis
Data Security	
PII Data	No

Catalog | BI Concierge - Powered by GPT | Search | New | Content | Kasey

Certainly, here are a few suggestions for a report that can be used to show sales performance:

1. Product Marketing Research. This report shows the sales performance of individual salespeople, making it easy to see who is performing well and who may need additional support or training. This Report can be presented as a table, with columns for salesperson name, total units sold, and total revenue generated.

2. Channel Analysis. This report shows sales performance by region, allowing management to identify which areas are performing well amd which ones need improvement. This report can be presented as a map or a table, with columns for region name, total units sold, and total revenue generated

3. Regional Sales. This report breaks down sales by individual product or service, making it easy to see which offerings are the most popular with customers. This report can be presented as a chart or table, with columns for product or service name, total units sold, and total revenue generated

That dashboard is at the category level and doesn't have any channel details. Do we have anything that provides performance analysis by channel?

Yes, Sales Analysis is one that has details of performance by Channel

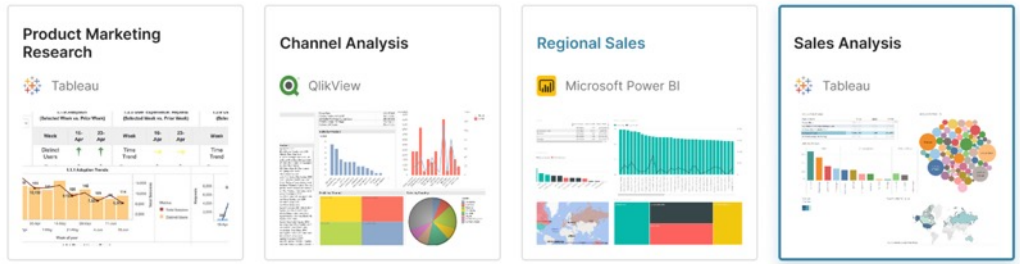
Subscribe me

Do you want me to include Sales Analysis in your Weekly Reporting Digest which you receive every Friday at 8AM?

No, please send this report to me through Slack on Monday morning at 9AM.

Submit

Start a new chat



Sales Analysis

Andrew Admin on 10/13/2022

Enterprise KPI	Sales, Cost, Profit, Units
Tags	Country, Channel
Business Owner	Sam Sales
Data Steward	Gary Governor
Technical Owner	Andrew Admin
Element ID	2261

Wine Daily sales analysis by country, product, and channel. Data is sourced from the sales datamart which is updated daily from Salesforce by the ops team.

Image Last Taken	Apr 13, 2023 3:06
Image Last Taken	Jul 28, 2022 21:57
Engagement	936
Collibra	
Collibra Status	Accepted
View In Collibra	Sales Analysis
Data Security	
PII Data	No

Catalog | BI Concierge - Powered by GPT | Search | New | Content | Kasey

Report can be presented as a table, with columns for salesperson name, total units sold, and total revenue generated.

2. Channel Analysis. This report shows sales performance by region, allowing management to identify which areas are performing well amd which ones need improvement. This report can be presented as a map or a table, with columns for region name, total units sold, and total revenue generated

3. Regional Sales. This report breaks down sales by individual product or service, making it easy to see which offerings are the most popular with customers. This report can be presented as a chart or table, with columns for product or service name, total units sold, and total revenue generated

That dashboard is at the category level and doesn't have any channel details. Do we have anything that provides performance analysis by channel?

Yes, Sales Analysis is one that has details of performance by Channel

Subscribe me

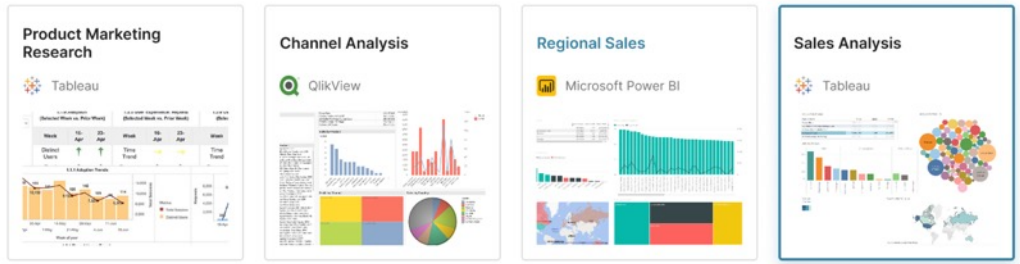
Do you want me to include Sales Analysis in your Weekly Reporting Digest which you receive every Friday at 8AM?

No, please send this report to me through Slack on Monday morning at 9AM.

OK, I'll create a new distribution to send Sales Analysis to you via Slack every Monday at 9AM.

Ask your question | Submit

Start a new chat



Sales Analysis

Andrew Admin on 10/13/2022

Enterprise KPI	Sales, Cost, Profit, Units
Tags	Country, Channel
Business Owner	Sam Sales
Data Steward	Gary Governor
Technical Owner	Andrew Admin
Element ID	2261

Wine Daily sales analysis by country, product, and channel. Data is sourced from the sales datamart which is updated daily from Salesforce by the ops team.

Image Last Taken	Apr 13, 2023 3:06
Image Last Taken	Jul 28, 2022 21:57
Engagement	936
Collibra	
Collibra Status	Accepted
View In Collibra	Sales Analysis
Data Security	
PII Data	No

Catalog | BI Concierge - Powered by GPT | Search | New | Content | Kasey

Report can be presented as a table, with columns for salesperson name, total units sold, and total revenue generated.

2. Channel Analysis. This report shows sales performance by region, allowing management to identify which areas are performing well amd which ones need improvement. This report can be presented as a map or a table, with columns for region name, total units sold, and total revenue generated

3. Regional Sales. This report breaks down sales by individual product or service, making it easy to see which offerings are the most popular with customers. This report can be presented as a chart or table, with columns for product or service name, total units sold, and total revenue generated

That dashboard is at the category level and doesn't have any channel details. Do we have anything that provides performance analysis by channel?

Yes, Sales Analysis is one that has details of performance by Channel

Subscribe me

Do you want me to include Sales Analysis in your Weekly Reporting Digest which you receive every Friday at 8AM?

No, please send this report to me through Slack on Monday morning at 9AM.

OK, I'll create a new distribution to send Sales Analysis to you via Slack every Monday at 9AM.

Ask your question | Submit

Start a new chat

Product Marketing Research — Tableau

Channel Analysis — QlikView

Regional Sales — Microsoft Power BI

Sales Analysis — Tableau

Sales Analysis

Subscribe me
Share with another user
Setup an alert

Andrew Admin on 10/13/202

Enterprise KPI	Sale
Tags	Country, Channel
Business Owner	Sam Sales
Data Steward	Gary Governor
Technical Owner	Andrew Admin
Element ID	2261

Wine Daily sales analysis by country, product, and channel. Data is sourced from the sales datamart which is updated daily from Salesforce by the ops team.

Image Last Taken	Apr 13, 2023 3:06
Image Last Taken	Jul 28, 2022 21:57
Engagement	936
Collibra	
Collibra Status	Accepted
View In Collibra	Sales Analysis
Data Security	
PII Data	No

which ones need improvement. This report can be presented as a map or a table, with columns for region name, total units sold, and total revenue generated

3. Regional Sales. This report breaks down sales by individual product or service, making it easy to see which offerings are the most popular with customers. This report can be presented as a chart or table, with columns for product or service name, total units sold, and total revenue generated

That dashboard is at the category level and doesn't have any channel details. Do we have anything that provides performance analysis by channel?

Yes, Sales Analysis is one that has details of performance by Channel

Subscribe me

Do you want me to include Sales Analysis in your Weekly Reporting Digest which you receive every Friday at 8AM?

No, please send this report to me through Slack on Monday morning at 9AM.

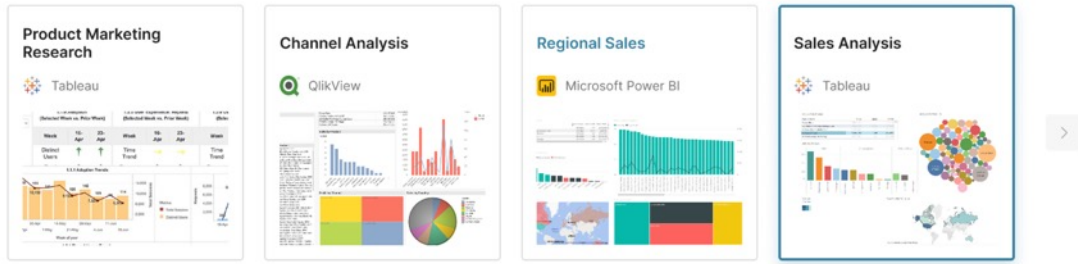
OK, I'll create a new distribution to send Sales Analysis to you via Slack every Monday at 9AM.

Share with another user

Please tell me to whom you want to send Sales Analysis and any message you want to include.

Ask your question | Submit

Start a new chat



Sales Analysis

Andrew Admin on 10/13/2022

Enterprise KPI	Sales, Cost, Profit, Units
Tags	Country, Channel
Business Owner	Sam Sales
Data Steward	Gary Governor
Technical Owner	Andrew Admin
Element ID	2261

Wine Daily sales analysis by country, product, and channel. Data is sourced from the sales datamart which is updated daily from Salesforce by the ops team.

Image Last Taken	Apr 13, 2023 3:06
Image Last Taken	Jul 28, 2022 21:57
Engagement	936
Collibra	
Collibra Status	Accepted
View In Collibra	Sales Analysis
Data Security	
PII Data	No

for region name, total units sold, and total revenue generated

3. Regional Sales. This report breaks down sales by individual product or service, making it easy to see which offerings are the most popular with customers. This report can be presented as a chart or table, with columns for product or service name, total units sold, and total revenue generated

That dashboard is at the category level and doesn't have any channel details. Do we have anything that provides performance analysis by channel?

Yes, Sales Analysis is one that has details of performance by Channel

Subscribe me

Do you want me to include Sales Analysis in your Weekly Reporting Digest which you receive every Friday at 8AM?

No, please send this report to me through Slack on Monday morning at 9AM.

OK, I'll create a new distribution to send Sales Analysis to you via Slack every Monday at 9AM.

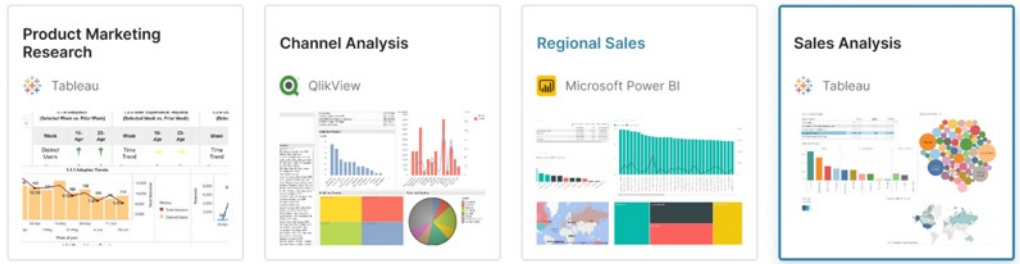
Share with another user

Please tell me to whom you want to send Sales Analysis and any message you want to include.

Send to @MikeSmith and ask him to check the sales numbers against our latest forecast.

Submit

Start a new chat



Sales Analysis

Andrew Admin on 10/13/2022

Enterprise KPI	Sales, Cost, Profit, Units
Tags	Country, Channel
Business Owner	Sam Sales
Data Steward	Gary Governor
Technical Owner	Andrew Admin
Element ID	2261

Wine Daily sales analysis by country, product, and channel. Data is sourced from the sales datamart which is updated daily from Salesforce by the ops team.

Image Last Taken	Apr 13, 2023 3:06
Image Last Taken	Jul 28, 2022 21:57
Engagement	936
Collibra	
Collibra Status	Accepted
View In Collibra	Sales Analysis
Data Security	
PII Data	No

Catalog | BI Concierge - Powered by GPT | Search | New | Content | Kasey

generated

That dashboard is at the category level and doesn't have any channel details. Do we have anything that provides performance analysis by channel?

Yes, Sales Analysis is one that has details of performance by Channel

Subscribe me

Do you want me to include Sales Analysis in your Weekly Reporting Digest which you receive every Friday at 8AM?

No, please send this report to me through Slack on Monday morning at 9AM.

OK, I'll create a new distribution to send Sales Analysis to you via Slack every Monday at 9AM.

Share with another user

Please tell me to whom you want to send Sales Analysis and any message you want to include.

Send to @MikeSmith and ask him to check the sales numbers against our latest forecast.

I emailed a copy of Sales Analysis to Mike Smith (mike.smith@wineco.org) with the message "John Frank asked that you please check the sales numbers in this report against our latest forecast."

Ask your question | Submit

Start a new chat

Product Marketing Research — Tableau

Channel Analysis — QlikView

Regional Sales — Microsoft Power BI

Sales Analysis — Tableau

Sales Analysis

Andrew Admin on 10/13/2022

Enterprise KPI	Sales, Cost, Profit, Units
Tags	Country, Channel
Business Owner	Sam Sales
Data Steward	Gary Governor
Technical Owner	Andrew Admin
Element ID	2261

Wine Daily sales analysis by country, product, and channel. Data is sourced from the sales datamart which is updated daily from Salesforce by the ops team.

Image Last Taken	Apr 13, 2023 3:06
Image Last Taken	Jul 28, 2022 21:57
Engagement	936
Collibra	
Collibra Status	Accepted
View In Collibra	Sales Analysis
Data Security	
PII Data	No

Catalog | BI Concierge - Powered by GPT | Search | New | Content | Kasey

generated

That dashboard is at the category level and doesn't have any channel details. Do we have anything that provides performance analysis by channel?

Yes, Sales Analysis is one that has details of performance by Channel

Subscribe me

Do you want me to include Sales Analysis in your Weekly Reporting Digest which you receive every Friday at 8AM?

No, please send this report to me through Slack on Monday morning at 9AM.

OK, I'll create a new distribution to send Sales Analysis to you via Slack every Monday at 9AM.

Share with another user

Please tell me to whom you want to send Sales Analysis and any message you want to include.

Send to @MikeSmith and ask him to check the sales numbers against our latest forecast.

I emailed a copy of Sales Analysis to Mike Smith (mike.smith@wineco.org) with the message "John Frank asked that you please check the sales numbers in this report against our latest forecast."

Ask your question | Submit

Start a new chat

Product Marketing Research
Tableau

Channel Analysis
QlikView

Regional Sales
Microsoft Power BI

Sales Analysis
Tableau

Sales Analysis

Subscribe me
Share with another user
Setup an alert

Andrew Admin on 10/13/202

Enterprise KPI	Sale
Tags	Country, Channel
Business Owner	Sam Sales
Data Steward	Gary Governor
Technical Owner	Andrew Admin
Element ID	2261

Wine Daily sales analysis by country, product, and channel. Data is sourced from the sales datamart which is updated daily from Salesforce by the ops team.

Image Last Taken	Apr 13, 2023 3:06
Image Last Taken	Jul 28, 2022 21:57
Engagement	936
Collibra	
Collibra Status	Accepted
View In Collibra	Sales Analysis
Data Security	
PII Data	No

Catalog | BI Concierge - Powered by GPT | Search | New | Content | Kasey

Yes, Sales Analysis is one that has details of performance by Channel

Subscribe me

Do you want me to include Sales Analysis in your Weekly Reporting Digest which you receive every Friday at 8AM?

No, please send this report to me through Slack on Monday morning at 9AM.

OK, I'll create a new distribution to send Sales Analysis to you via Slack every Monday at 9AM.

Share with another user

Please tell me to whom you want to send Sales Analysis and any message you want to include.

Send to @MikeSmith and ask him to check the sales numbers against our latest forecast.

I emailed a copy of Sales Analysis to Mike Smith (mike.smith@wineco.org) with the message "John Frank asked that you please check the sales numbers in this report against our latest forecast."

Setup an alert

Please let me know your alert condition for Sales Analysis?

Ask your question | Submit

Start a new chat

Product Marketing Research — Tableau

Channel Analysis — QlikView

Regional Sales — Microsoft Power BI

Sales Analysis — Tableau

Sales Analysis

Andrew Admin on 10/13/2022

Enterprise KPI	Sales, Cost, Profit, Units
Tags	Country, Channel
Business Owner	Sam Sales
Data Steward	Gary Governor
Technical Owner	Andrew Admin
Element ID	2261

Wine Daily sales analysis by country, product, and channel. Data is sourced from the sales datamart which is updated daily from Salesforce by the ops team.

Image Last Taken	Apr 13, 2023 3:06
Image Last Taken	Jul 28, 2022 21:57
Engagement	936
Collibra	
Collibra Status	Accepted
View In Collibra	Sales Analysis
Data Security	
PII Data	No

Catalog | BI Concierge - Powered by GPT | Search | New | Content | Kasey

Yes, Sales Analysis is one that has details of performance by Channel

Subscribe me

Do you want me to include Sales Analysis in your Weekly Reporting Digest which you receive every Friday at 8AM?

No, please send this report to me through Slack on Monday morning at 9AM.

OK, I'll create a new distribution to send Sales Analysis to you via Slack every Monday at 9AM.

Share with another user

Please tell me to whom you want to send Sales Analysis and any message you want to include.

Send to @MikeSmith and ask him to check the sales numbers against our latest forecast.

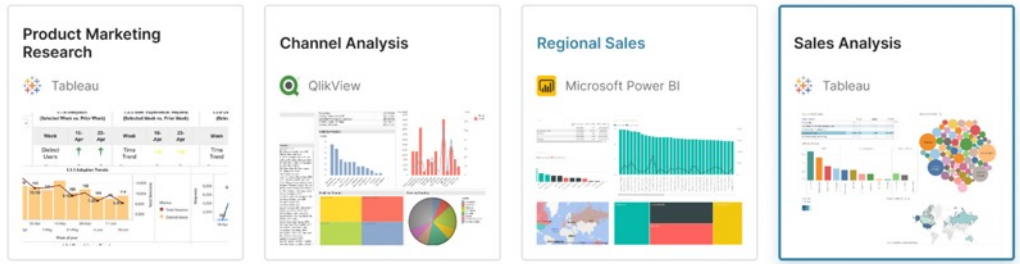
I emailed a copy of Sales Analysis to Mike Smith (mike.smith@wineco.org) with the message "John Frank asked that you please check the sales numbers in this report against our latest forecast."

Setup an alert

Please let me know your alert condition for Sales Analysis?

Alert me if sales in Canada drops unexpectedly. | Submit

Start a new chat



Sales Analysis

Andrew Admin on 10/13/2022

Enterprise KPI	Sales, Cost, Profit, Units
Tags	Country, Channel
Business Owner	Sam Sales
Data Steward	Gary Governor
Technical Owner	Andrew Admin
Element ID	2261

Wine Daily sales analysis by country, product, and channel. Data is sourced from the sales datamart which is updated daily from Salesforce by the ops team.

Image Last Taken	Apr 13, 2023 3:06
Image Last Taken	Jul 28, 2022 21:57
Engagement	936
Collibra	
Collibra Status	Accepted
View In Collibra	Sales Analysis
Data Security	
PII Data	No

Catalog | BI Concierge - Powered by GPT | Search | New | Content | Kasey

Weekly Reporting Digest which you receive every Friday at 8AM?

No, please send this report to me through Slack on Monday morning at 9AM.

OK, I'll create a new distribution to send Sales Analysis to you via Slack every Monday at 9AM.

Share with another user

Please tell me to whom you want to send Sales Analysis and any message you want to include.

Send to @MikeSmith and ask him to check the sales numbers against our latest forecast.

I emailed a copy of Sales Analysis to Mike Smith (mike.smith@wineco.org) with the message "John Frank asked that you please check the sales numbers in this report against our latest forecast."

Setup an alert

Please let me know your alert condition for Sales Analysis?

Alert me if sales in Canada drops unexpectedly.

I setup an alert to send you Sales Analysis if sales in Canada falls by more than 20% from the 30 day moving average. I scheduled this alert to come to you via email at 9AM daily if the condition is met.

Ask your question | Submit

Start a new chat

Product Marketing Research — Tableau

Channel Analysis — QlikView

Regional Sales — Microsoft Power BI

Sales Analysis — Tableau

Sales Analysis

Andrew Admin on 10/13/2022

Enterprise KPI	Sales, Cost, Profit, Units
Tags	Country, Channel
Business Owner	Sam Sales
Data Steward	Gary Governor
Technical Owner	Andrew Admin
Element ID	2261

Wine Daily sales analysis by country, product, and channel. Data is sourced from the sales datamart which is updated daily from Salesforce by the ops team.

Image Last Taken	Apr 13, 2023 3:06
Image Last Taken	Jul 28, 2022 21:57
Engagement	936
Collibra	
Collibra Status	Accepted
View In Collibra	Sales Analysis
Data Security	
PII Data	No

Catalog | BI Concierge - Powered by GPT | Search | New | Content | Kasey

Friday at 8AM?

No, please send this report to me through Slack on Monday morning at 9AM.

OK, I'll create a new distribution to send Sales Analysis to you via Slack every Monday at 9AM.

Share with another user

Please tell me to whom you want to send Sales Analysis and any message you want to include.

Send to @MikeSmith and ask him to check the sales numbers against our latest forecast.

I emailed a copy of Sales Analysis to Mike Smith (mike.smith@wineco.org) with the message "John Frank asked that you please check the sales numbers in this report against our latest forecast."

Setup an alert

Please let me know your alert condition for Sales Analysis?

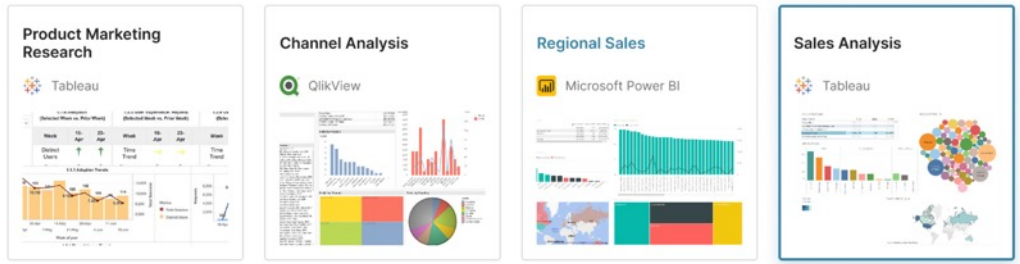
Alert me if sales in Canada drops unexpectedly.

I setup an alert to send you Sales Analysis if sales in Canada falls by more than 20% from the 30 day moving average. I scheduled this alert to come to you via email at 9AM daily if the condition is met.

Please change this to a 30% threshold and send it to my Mobile App.

Submit

Start a new chat



Sales Analysis

Andrew Admin on 10/13/2022

Enterprise KPI	Sales, Cost, Profit, Units
Tags	Country, Channel
Business Owner	Sam Sales
Data Steward	Gary Governor
Technical Owner	Andrew Admin
Element ID	2261

Wine Daily sales analysis by country, product, and channel. Data is sourced from the sales datamart which is updated daily from Salesforce by the ops team.

Image Last Taken	Apr 13, 2023 3:06
Image Last Taken	Jul 28, 2022 21:57
Engagement	936
Collibra	
Collibra Status	Accepted
View In Collibra	Sales Analysis
Data Security	
PII Data	No

Catalog | BI Concierge - Powered by GPT | Search | New | Content | Kasey

Share with another user

Please tell me to whom you want to send Sales Analysis and any message you want to include.

Send to @MikeSmith and ask him to check the sales numbers against our latest forecast.

I emailed a copy of Sales Analysis to Mike Smith (mike.smith@wineco.org) with the message "John Frank asked that you please check the sales numbers in this report against our latest forecast."

Setup an alert

Please let me know your alert condition for Sales Analysis?

Alert me if sales in Canada drops unexpectedly.

I setup an alert to send you Sales Analysis if sales in Canada falls by more than 20% from the 30 day moving average. I scheduled this alert to come to you via email at 9AM daily if the condition is met.

Please change this to a 30% threshold and send it to my Mobile App.

I setup an alert to send you Sales Analysis if sales in Canada falls by more than 30% from the 30 day moving average. I scheduled this alert to come to you via mobile at 9AM daily if the condition is met.

Ask your question | Submit

Start a new chat

Product Marketing Research — Tableau

Channel Analysis — QlikView

Regional Sales — Microsoft Power BI

Sales Analysis — Tableau

Sales Analysis

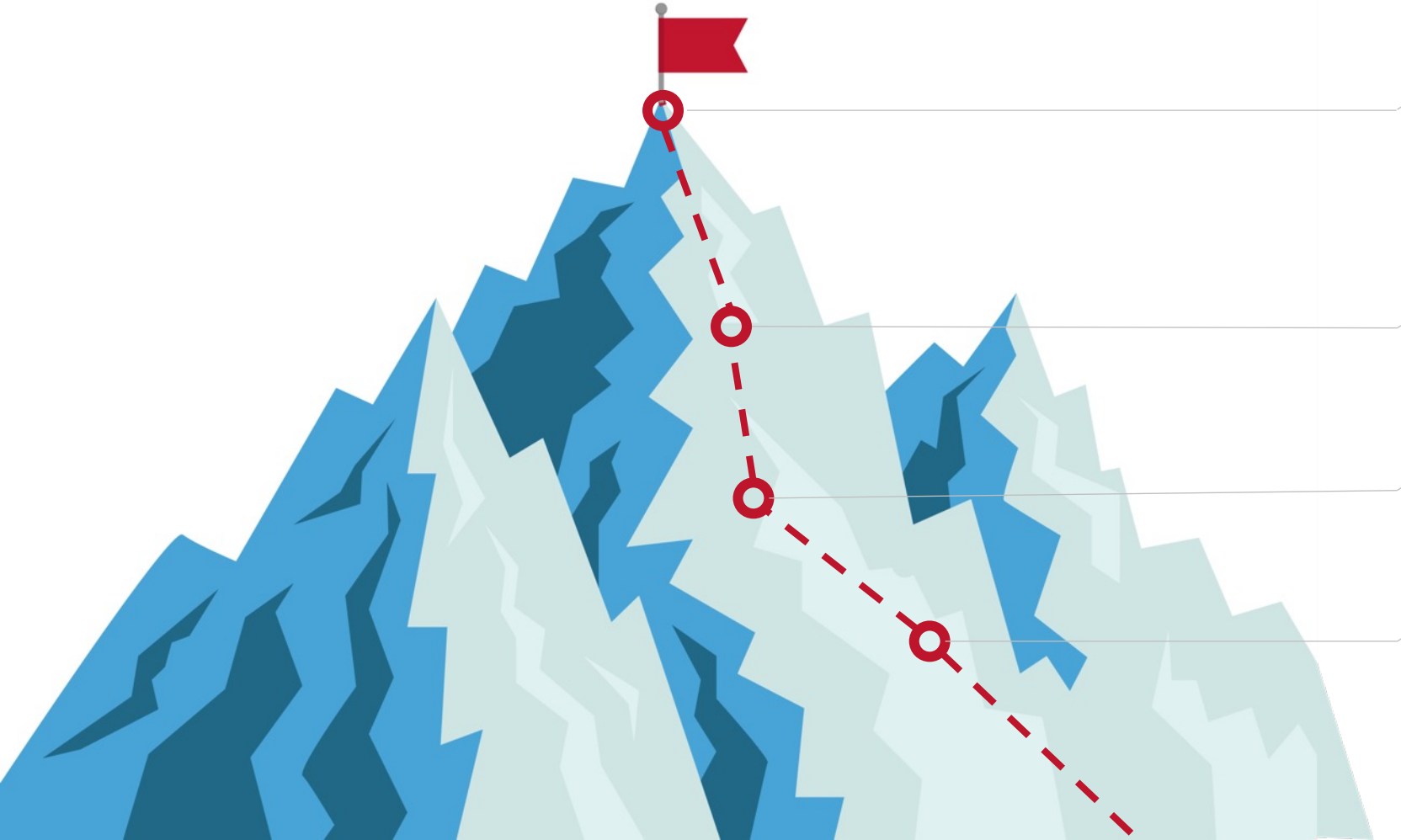
Andrew Admin on 10/13/2022

Enterprise KPI	Sales, Cost, Profit, Units
Tags	Country, Channel
Business Owner	Sam Sales
Data Steward	Gary Governor
Technical Owner	Andrew Admin
Element ID	2261

Wine Daily sales analysis by country, product, and channel. Data is sourced from the sales datamart which is updated daily from Salesforce by the ops team.

Image Last Taken	Apr 13, 2023 3:06
Image Last Taken	Jul 28, 2022 21:57
Engagement	936
Collibra	
Collibra Status	Accepted
View In Collibra	Sales Analysis
Data Security	
PII Data	No

THE **BI USER JOURNEY**



Answer your questions

3. Analyze – BI Tools

2. Understand – BI Portal

1. Discover – BI Portal

Q&A

www.metricinsights.com

44 Tehama Street
San Francisco
CA 94105
United States

+1 800 993 3467

info@metricinsights.com

METRIC INSIGHTS
ENTERPRISE BUSINESS INTELLIGENCE PORTAL

Give your data the audience it deserves

© Metric Insights 2023