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E-BOOK

Beyond the Dashboard:

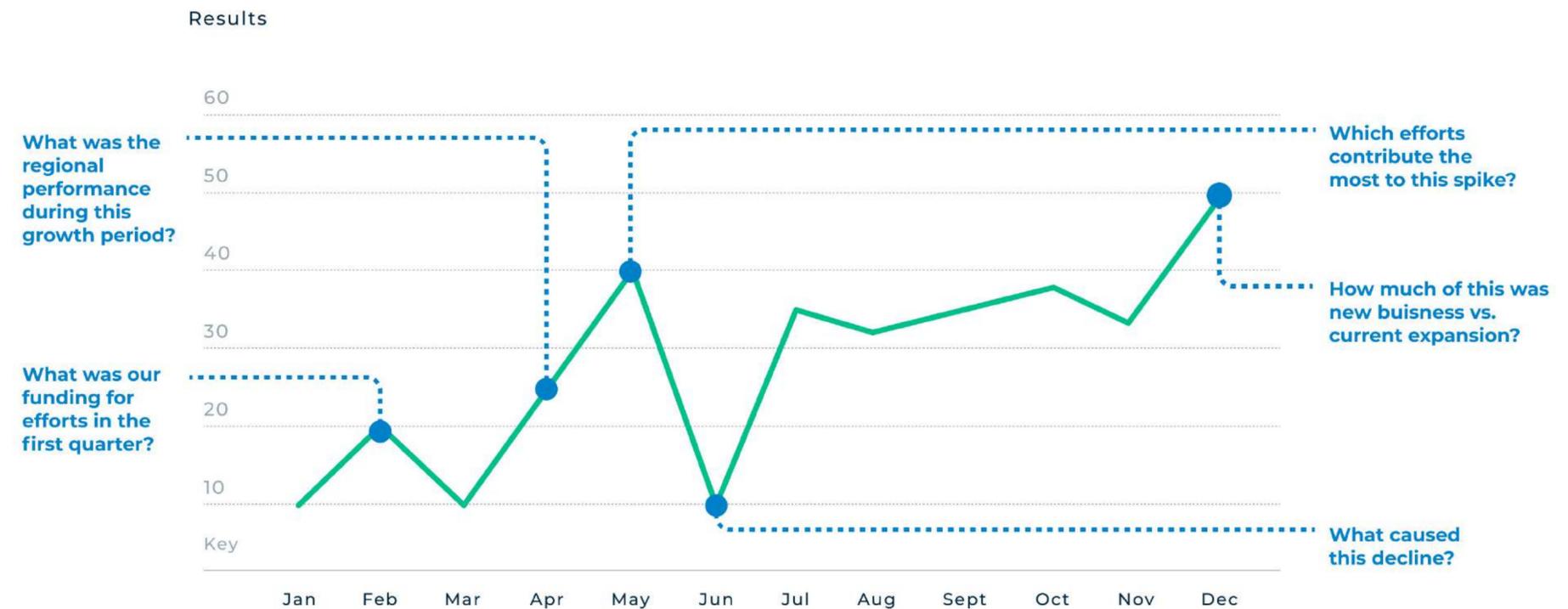Answer any question about your data in minutes.

Let's cut to the chase — dashboards are limited.

They're great when you need to present information in an easily digestible format, provide high-level answers to questions, and make information visually appealing for presentations.

But they're bad when you need answers for:

- **What changed?**
- **What caused the change?**
- **What do we do about the change?**

It's not the dashboard's fault. It wasn't originally designed for answering those questions.

Results

What was the regional performance during this growth period?

What was our funding for efforts in the first quarter?

Which efforts contribute the most to this spike?

How much of this was new buisness vs. current expansion?

What caused this decline?

60
50
40
30
20
10
Key

Jan Feb Mar Apr May Jun Jul Aug Sept Oct Nov Dec

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Despite that, so many people depend on dashboards to make business decisions. You probably do, too. So do many people at your organization.

And that leads you and everyone else to:

- **Miss out on key factors or make the wrong assumptions**
- **Make poor decisions that lead to less revenue and profit**
- **Devote time and budget to the wrong campaigns and initiatives**

It's not your fault. You're limited by the dashboard. So, when revenue is down, and someone asks:

- **What changed?**
- **What caused the change?**
- **What do we do about it?**

You're stuck trying to come up with the answer.

But finding the answer to those questions is time consuming and resource intensive.

And you often only have so long. Sometimes the end of the week, the end of the day, or, even worse, by the end of the meeting.

You do one of two things: (1) Make the best decision you can based on your experience and the limited information you have or (2) place an urgent request for more analysis, creating bottlenecks and rushed results.

Then, something bad happens.

Because you and the rest of the organization needs answers to these questions that are asked over and over again, you do the same thing — you create more dashboards.

There are only three ways to go about this, too:

1. **Hire more talent to increase analytic output**
2. **Outsource the work to a third party**
3. **Increase the demand on your current workforce**

None of these solve the actual problem of surfacing insights. None of the dashboards do a good job of helping you answer:

- **What changed?**
- **What caused the change?**
- **What do we do about it?**

What if you could still use dashboards to do the things they were designed to do well, but complement them with technology that could do the things that dashboards don't do well?

And you could do it all without having to use more of your analyst time, build complex models, or a single line of code?

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What you would have is something like this:

What you see in the image is AI automatically digging into your data and surfacing the information you need — in minutes.

Without code.

Without more work for your analytics team.

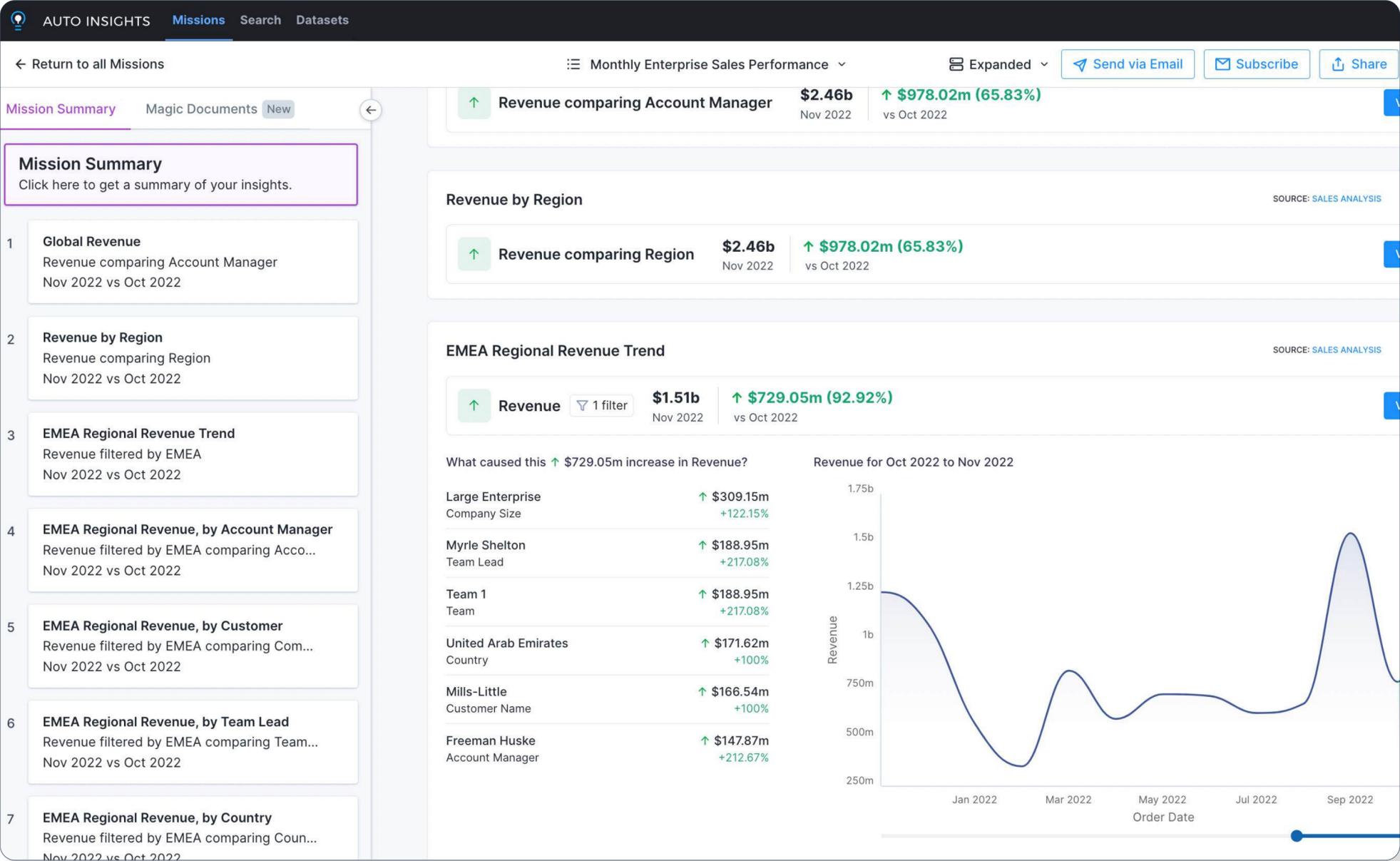**Without complicated processes.**

It's AI using the data you provide it from the cloud or your desktop to give you the answers you need.

It's so quick that you or anyone else can explore the data before or during a meeting and get the information you need to answer questions and make informed decisions.

In seconds, it does the work that analysts typically take hours to perform, leaving them available to dedicate more time to other important projects.

And it does all of this with any datasets you have ready to go.

And it helps you answer three big questions.

AUTO INSIGHTS   Missions   Search   Datasets

← Return to all Missions   ☰ Monthly Enterprise Sales Performance ⌄   ⊟ Expanded ⌄   ✈ Send via Email   ✉ Subscribe   ⬆ Share

Mission Summary   Magic Documents [New]   ←

Mission Summary
Click here to get a summary of your insights.

1 **Global Revenue**
Revenue comparing Account Manager
Nov 2022 vs Oct 2022

2 **Revenue by Region**
Revenue comparing Region
Nov 2022 vs Oct 2022

3 **EMEA Regional Revenue Trend**
Revenue filtered by EMEA
Nov 2022 vs Oct 2022

4 **EMEA Regional Revenue, by Account Manager**
Revenue filtered by EMEA comparing Acco...
Nov 2022 vs Oct 2022

5 **EMEA Regional Revenue, by Customer**
Revenue filtered by EMEA comparing Com...
Nov 2022 vs Oct 2022

6 **EMEA Regional Revenue, by Team Lead**
Revenue filtered by EMEA comparing Team...
Nov 2022 vs Oct 2022

7 **EMEA Regional Revenue, by Country**
Revenue filtered by EMEA comparing Coun...
Nov 2022 vs Oct 2022

↑ Revenue comparing Account Manager $2.46b Nov 2022   ↑ $978.02m (65.83%) vs Oct 2022

Revenue by Region   SOURCE: SALES ANALYSIS

↑ Revenue comparing Region $2.46b Nov 2022   ↑ $978.02m (65.83%) vs Oct 2022

EMEA Regional Revenue Trend   SOURCE: SALES ANALYSIS

↑ Revenue   ▽ 1 filter $1.51b Nov 2022   ↑ $729.05m (92.92%) vs Oct 2022

What caused this ↑ $729.05m increase in Revenue?

		Revenue for Oct 2022 to Nov 2022
Large Enterprise / Company Size	↑ $309.15m / +122.15%	
Myrle Shelton / Team Lead	↑ $188.95m / +217.08%	
Team 1 / Team	↑ $188.95m / +217.08%	
United Arab Emirates / Country	↑ $171.62m / +100%	
Mills-Little / Customer Name	↑ $166.54m / +100%	
Freeman Huske / Account Manager	↑ $147.87m / +212.67%	

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1. What changed?

If something changes, the AI automatically finds out for you. It runs thousands of data combinations to find hidden anomalies and outliers.

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2. What caused the change?

If there's a sudden decline in sales, the AI can find the factors that most likely contributed to it, including which specific categories, accounts, regions, branches, and more.

+$309.15m

+$284.2m

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3. What do we do about it?

The AI can create personalized reports that you can share with others, automatically updating all insights and reports daily and sending them to inboxes.

Language-based AI, such as natural language generation (NLG), summarizes and explains the insights in a clear, easy-to-understand language.

It can also translate your findings into shareable formats, such as email and PowerPoint presentations. You can start with a question, get an answer, and have AI do the heavy lifting of creating a presentation for you.

Before you have a meeting, everyone can have the data in their hands. They can also use the dataset and software to explore questions, too.

While you're in a meeting, you could use the software to explore data, answer questions, and, more importantly, make a more informed decision.

It can identify potential problems and unnoticed changes as well as trends and opportunities.

AUTO INSIGHTS   **Missions**   Search   Datasets

← Return to all Missions

Mission Summary   **Magic Documents** New

Documents   + New document

Presentation
Presentation to the Head of sales about Monthly Enterprise Sales Performance

Email
Email to the Head of sales about Monthly Enterprise Sales Performance

Presentation
Presentation to the Finance team about Monthly Enterprise Sales Performance

EMAIL PREVIEW

Email to the Head of sales about Monthly Enterprise Sales Performance
Document generated on 22nd June 2023 ✓ LATEST DATA | 🕐 1 min to read

Subject: Monthly Enterprise Sales Performance - Improvement Recommendations

Dear Head of Sales,

Based on our analysis, we found some key insights from the Monthly Enterprise Sales Performance report. Below are the m
findings and suggestions for improvement:

- A significant increase in revenue was observed in the EMEA region, Large Enterprise segment, and specific teams (Team
and Team 8).
- The United Arab Emirates showed a substantial increase in revenue, with Mills-Little as the top-performing customer.
- Freeman Huske, Anne Pealing, Myrle Shelton, and Noll Britten were the top-performing account managers and team leads

Recommendations:

1. Focus on Large Enterprise and Enterprise segments as they make up 69.78% of all revenue.
2. Investigate the success factors of the top-performing account managers and team leads, and share best practices acros
organization.
3. Explore potential growth opportunities in countries with increasing revenue like the United Arab Emirates.
4. Address the performance issues of account managers and team leads with decreasing revenue, such as Anthe Caswill, A
Haimes, Barbara Cockren, and Alma Goodread.

Please find the detailed analysis and data source here: https://alteryx-us.autoinsights.alteryxcloud.com/missions/view/d85
e174-4616-9a76-9a8ce01e306a

Kind regards,
[Your Name]

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Conclusion

Current dashboards are limited, but they don't have to be. Companies are already using AI to generate automatic insights using the data they have.

They're surfacing trends, exploring data, and making better decisions – all without needing to create more dashboards or stressing out their analytics team.

You can learn more about the software here.

Try a free, personalized interactive demo here.

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alteryx | AI PLATFORM
FOR ENTERPRISE ANALYTICS

About Alteryx

Alteryx powers actionable insights with the AI Platform for Enterprise Analytics. With Alteryx, organizations can drive smarter, faster decisions with a secure platform deployable in on-prem, hybrid, and cloud environments. More than 8,000 customers globally rely on Alteryx to automate analytics to improve revenue performance, manage costs, and mitigate risks across their organizations.

To learn more, visit www.alteryx.com.