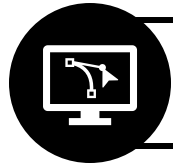


Our Perspective on Data Visualization

June 03, 2025

Topics discussed to understand modern BI and AI-driven dashboards real-time insights and increased user adoption

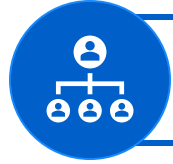
Key insights:



Organizations are adopting **advanced visualization tools** and interactive dashboards to drive data-driven decisions. AI and Decision Intelligence are enhancing personalization and predictive capabilities.



Many businesses still rely on manual reporting due to comfort with old processes, lack of training, and unclear ROI. This **limits real-time insights and slows decision-making**.



Dashboards are **tailored to strategic, tactical, and operational levels based on analytical needs**. A structured framework ensures relevant insights reach the right decision-makers.



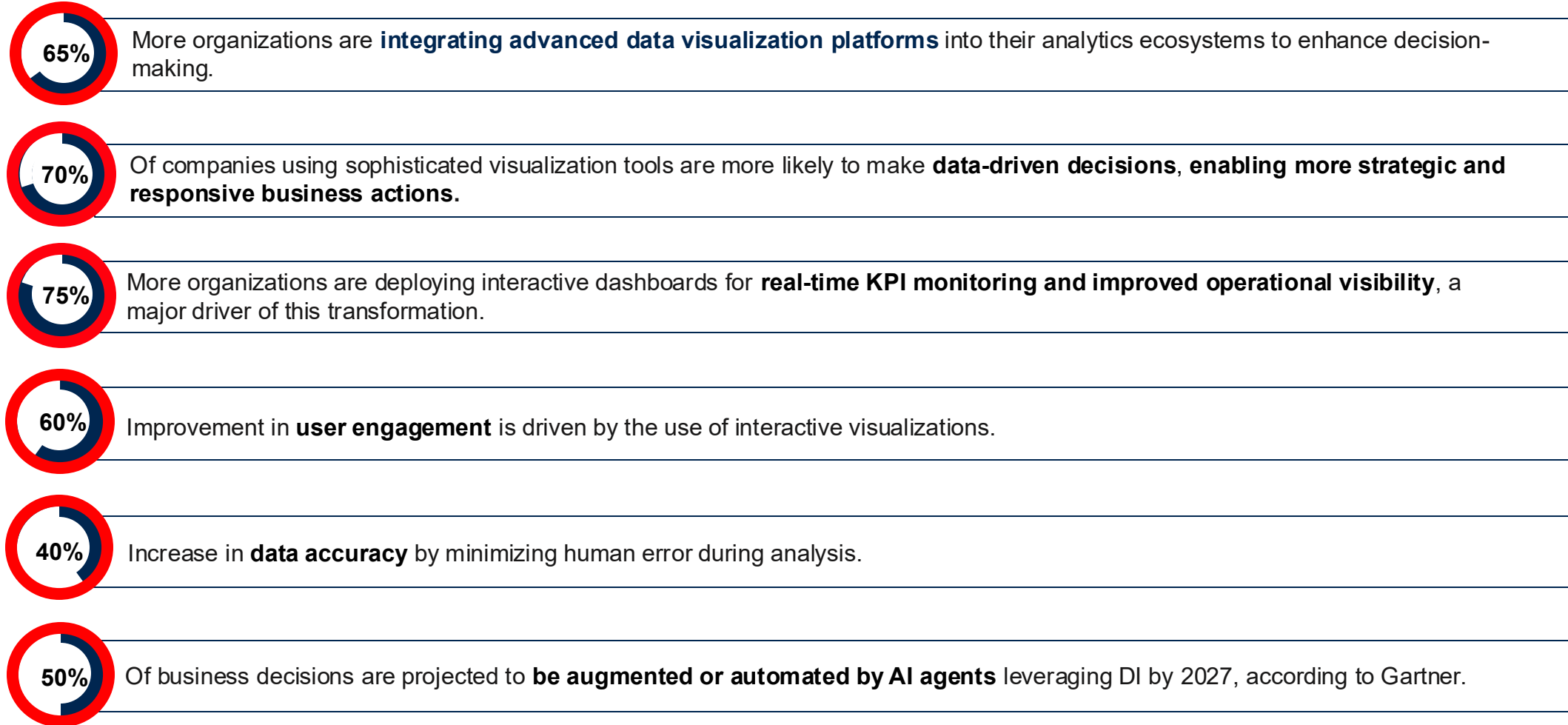
Driving **BI adoption** requires strong data quality, executive sponsorship, and continuous training. Building user confidence and providing easy access to insights are key enablers.



BI tools vary in features, cost, and usability. Comparing tools helps **organizations choose the right platform** for faster, informed decisions.

Businesses are rapidly adopting data visualization to gain instant and actionable insights

AI and Decision Intelligence are transforming data visualization, enabling SMEs to gain personalized, predictive insights and make smarter, faster, and more informed data-driven business decisions.



Many organizations continue to rely on manual reports, due to change resistance and limited awareness of BI value

Let's understand why some business still prefer to use manual data reporting and analyze some problems faced by them



Businesses often prefer **stable, familiar processes** over adopting new technologies.



Setting up BI systems is considered **time-consuming**, involving complex data and dashboard creation.



BI tools are seen as **non-essential**, mainly in conservative or risk-averse cultures.



Upfront costs for licenses, infrastructure, and training can be demotivating. Businesses hesitate due to **unclear ROI**.



Many users **do not recognize the strategic benefits** of BI tools, such as real-time insights and automation.



Implementing BI tools involves **slow-moving approval** processes which deter teams from initiating BI adoption.



Users often **lack the skills or experience** to use BI tools effectively due to deprioritization of training on these tools.



Poor data quality or inconsistency, raises security concerns, especially in regulated sectors.

Advanced data visualizations help stakeholders' needs by overcoming manual reporting challenges

Challenges with manual reporting and how using advanced reporting solves these challenges

Challenges with manual reporting

- Reporting is manual and reactive, across Bus.
- Much of the reporting effort is concentrated on the controller, making the process reliant on one role.
- Insights take 5–7 days to compile; often outdated by the time they're reviewed.
- Raw data access by PE creates tension, second-guessing, and misalignment.
- Cross-company comparisons are currently ad hoc, as there's no shared reporting lens to view company alongside peers.

Common use cases indicating need of advanced reporting



CEO

"I want a clean view of performance by BU — without chasing numbers every week."

Weekly pulse dashboards → revenue trends, margin signals.



CFO

"If I had a real-time cost/margin view, I wouldn't need to prepare 10 different trackers."

Self-serve cost and margin dashboards → board-ready in minutes, not days.



Group Controller

"I spend hours each week pulling data and creating reports manually for others — it's not sustainable."

Automated dashboards → reduces dependency on manual pulls and frees controller bandwidth.



Investor (PE Firm)

"I want to be able to know if there is any optimization opportunity."

Investor-ready scorecard → surfaces inefficiencies without exposing raw data.

Strategic value unlocked with advanced data visualization



Real-time visibility across BUs → Drives faster decisions and issue escalation.



Reduced manual load on Controller → Enables shift from data provider to governance partner.



Investor-ready scorecards → Reduces risk and effort during exit due diligence.



One version of the truth → Strengthens cross-BU alignment and governance consistency.



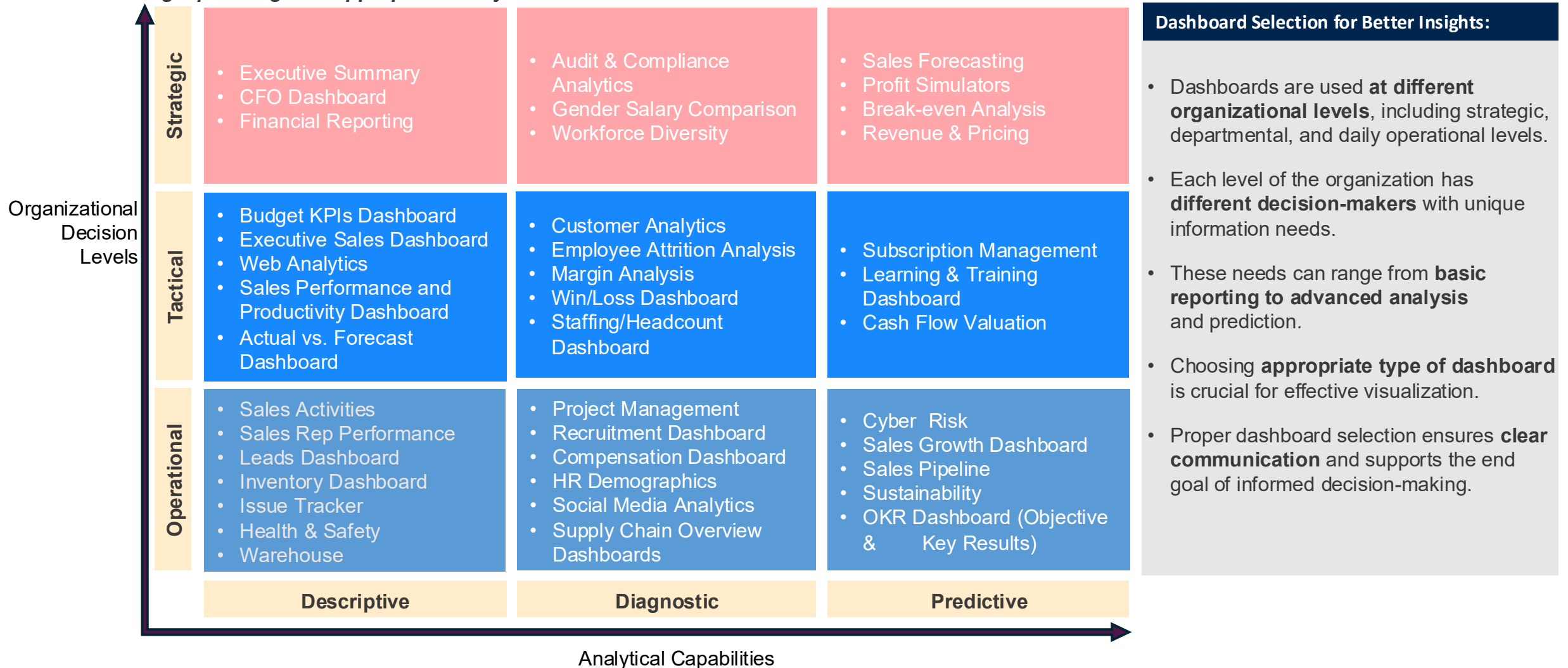
Built-in access control → Ensures external stakeholders (e.g., PE) see insights, not raw data.



Reporting time drops from 5+ days to seconds → Frees up CFO/FP&A capacity for strategic decision support.

Dashboards support diverse use cases across organization, tailored to varying analytical requirements

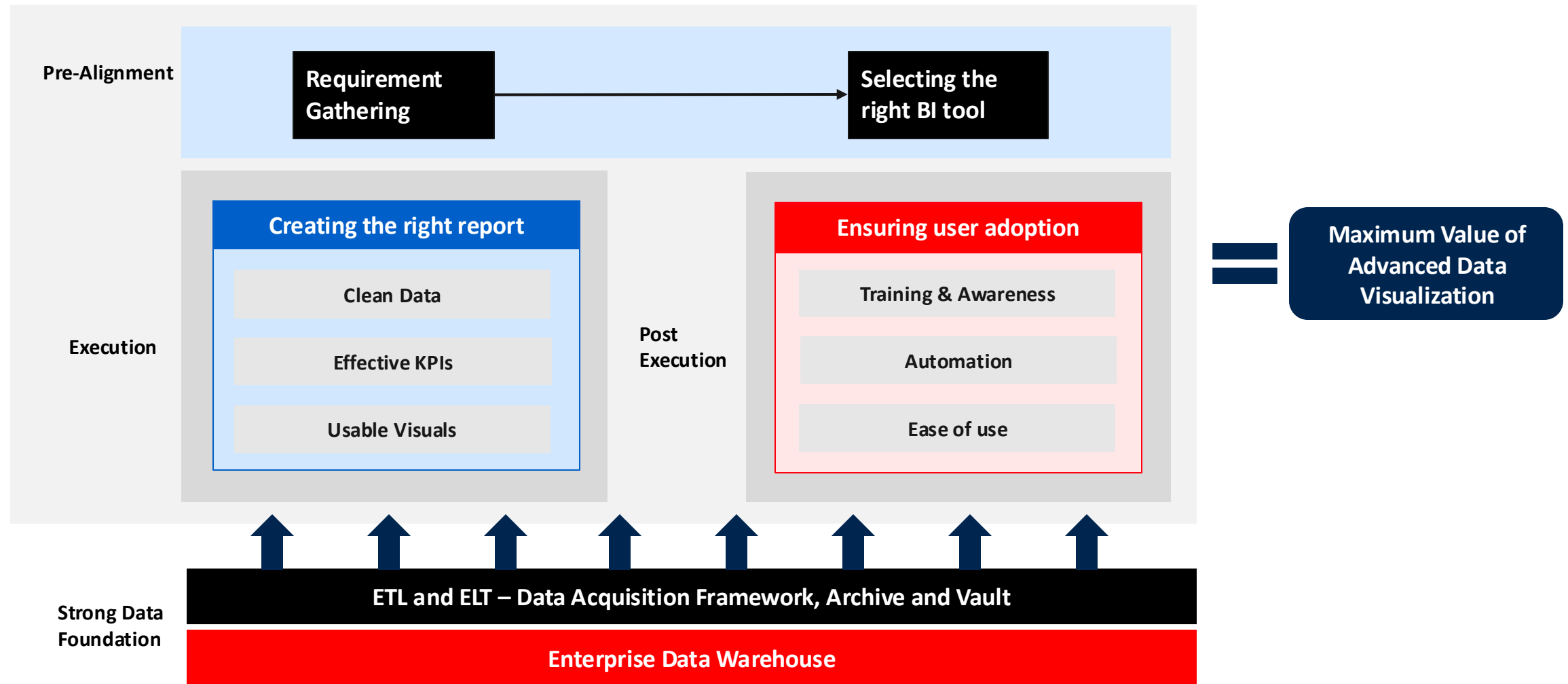
A model used to ensure the right dashboards deliver relevant insights to the right stakeholders, supporting daily operations, departmental decisions, and strategic planning with appropriate analytics.



Dashboard Selection for Better Insights:

- Dashboards are used **at different organizational levels**, including strategic, departmental, and daily operational levels.
- Each level of the organization has **different decision-makers** with unique information needs.
- These needs can range from **basic reporting to advanced analysis** and prediction.
- Choosing **appropriate type of dashboard** is crucial for effective visualization.
- Proper dashboard selection ensures **clear communication** and supports the end goal of informed decision-making.

Creating dashboards is only one piece - real value needs alignment, strong data foundations, and committed user adoption



To ensure successful adoption, organizations must align the BI tool with user needs, capabilities, and workflows

Key factors that help drive successful business outcomes through effective BI tool adoption:

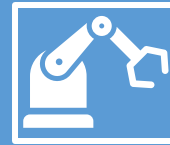
Requirement Gathering

Identify the data and pricing requirements of stakeholders, then compile a detailed report that fulfills their needs.



ETL Automation

Automated ETL and data pipelines enable dashboards to refresh seamlessly with minimal human interaction.



Catering to User Needs

The focus is not on creating appealing visuals, but on delivering insights that are useful and actionable for stakeholders.



Selecting the Right Tool

Each tool has its pros and cons, so, it's important to choose one that best fits the organization's needs, budget, and goals.



Awareness and Training

Equipping users with the right knowledge before launch, along with ongoing training, ensures smoother and effective adoption.

























Ease of Use

Dashboards must be user-friendly, with clear content and guidance to help users easily understand and navigate them.



Each BI tool has pros and cons – to ensure adoption, choose one that best fits your organization’s needs and user capabilities

Different BI tools serve different business needs, comparing them ensures users pick the right one that helps in faster decision making:

Scope	 Power BI	 Tableau	 Qlik	 MS Excel
Flexibility	Slightly less flexible than Tableau. 	Higher flexibility and supports multi layered views. 	Qlik offers highly flexible design and data discovery capabilities. 	Limited flexibility and basic interactions. 
Cost	Free version to \$20/user/month(Premium). 	\$15/user/month (Viewer) to \$75/user/month (Creator). 	Free version to \$30/user/month (Business). 	Free web version included within MS365. 
OS compatibility*		 		 
Performance	Small Dataset  Large Dataset	Small Dataset  Large Dataset	Small Dataset  Large Dataset	Small Dataset  Large Dataset
Data Preparation	ETL can be done in Power Query, but it slows the dashboard refresh rate with larger datasets.	External tool like Alteryx/ Tableau Prep is required for ETL.	Built-in ETL capabilities for deep data discovery and prep.	Basic data cleaning and transformation with Power Query.
Programming Language	Natively supports DAX, also compatible with R and Python.	Integrates with R and Python for advanced programming.	Supports scripting for advanced analytics.	Supports advanced use with VBA and Power Query.

*: PBI and Qlik is only available as web-based application in Mac OS

Let's explore how we can
support your next project.

Get in touch to schedule a consultation.

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