

Introduction to Business Intelligence Fundamentals

- - Welcome and course objectives
- - BI turns raw data into insights for informed decisions
- - Used by analysts, operations teams, and managers
- - Goes beyond static reports and manual spreadsheets



Why Evidence-Based Decisions Matter Now



- Data growth in everyday operations



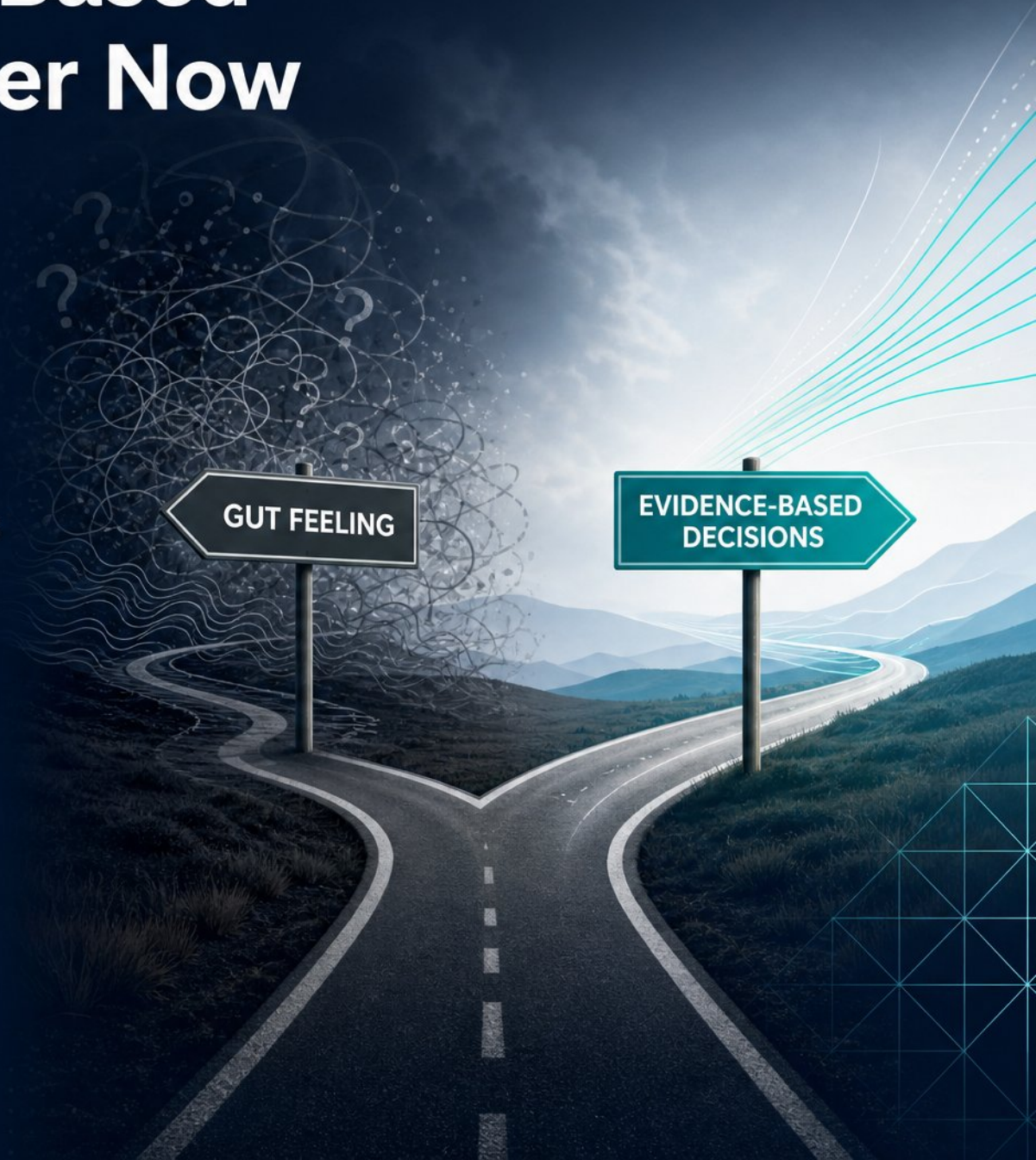
- From gut feel to evidence-based decisions



- Typical pain points BI can reduce



- Business value examples across departments



Key Terms: Data, Metrics, Dimensions, and KPIs



Data

Raw facts and observations collected from various sources.



Metric

A measure or calculation that tracks values and quantifies performance.



Dimension

A descriptive attribute that provides context and perspective.



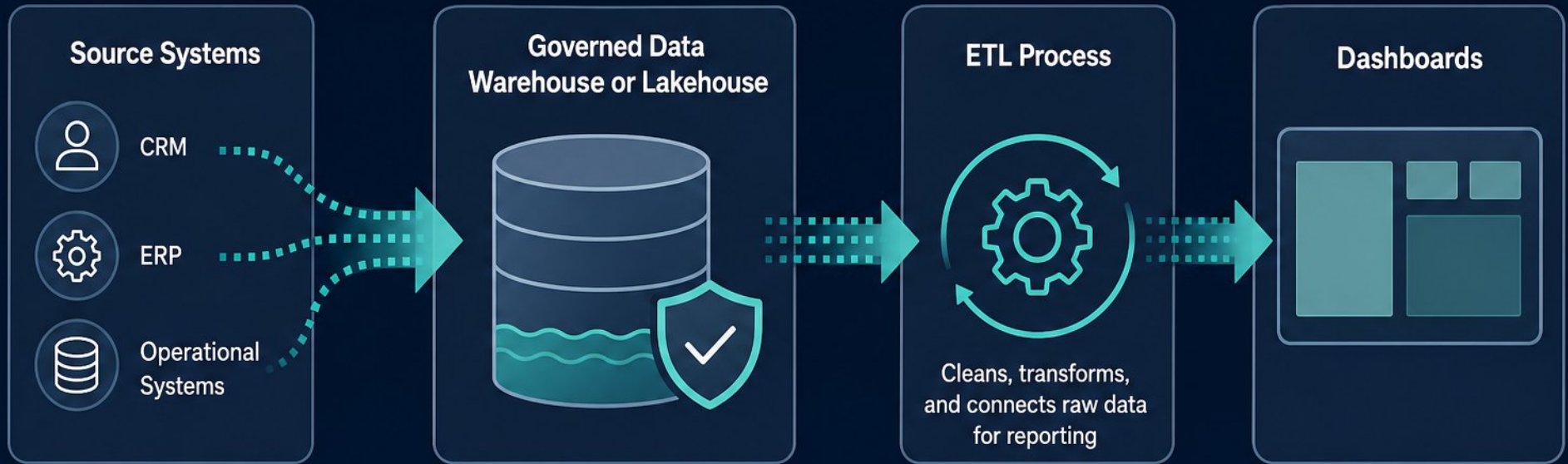
KPI

A key performance indicator used to evaluate success against objectives.



- Data becomes information; insight drives decisions
- Measures track values; dimensions provide context
- Filters narrow views to answer focused questions
- Dashboards display KPIs; reports provide structured detail
- Common KPIs: order accuracy, OEE, churn, margin

How Data Flows from Source to Dashboard



- Data originates in CRM, ERP, and operational systems
- Source systems feed into a governed data warehouse or lakehouse
- ETL cleans, transforms, and connects raw data for reporting
- Clean, connected data builds trust and prevents conflicting numbers

The BI Tool Landscape

- Spreadsheets limit scale but BI platforms govern data.
- Power BI and Tableau suit broad enterprise and visual dashboards.
- ThoughtSpot, Sigma, and Metabase excel at self-service exploration.
- AI assistants now enable natural-language, agentic analytics.
- Match tools to team skills and existing data ecosystem.



Designing Dashboards That Drive Action



- Start with a clear, high-value business question



- Match each insight to the right chart type



- Avoid clutter: fewer, sharper visuals win



- Make dashboards role-specific and actionable



- Guide users toward the next decision or action



Reading BI Outputs with Confidence



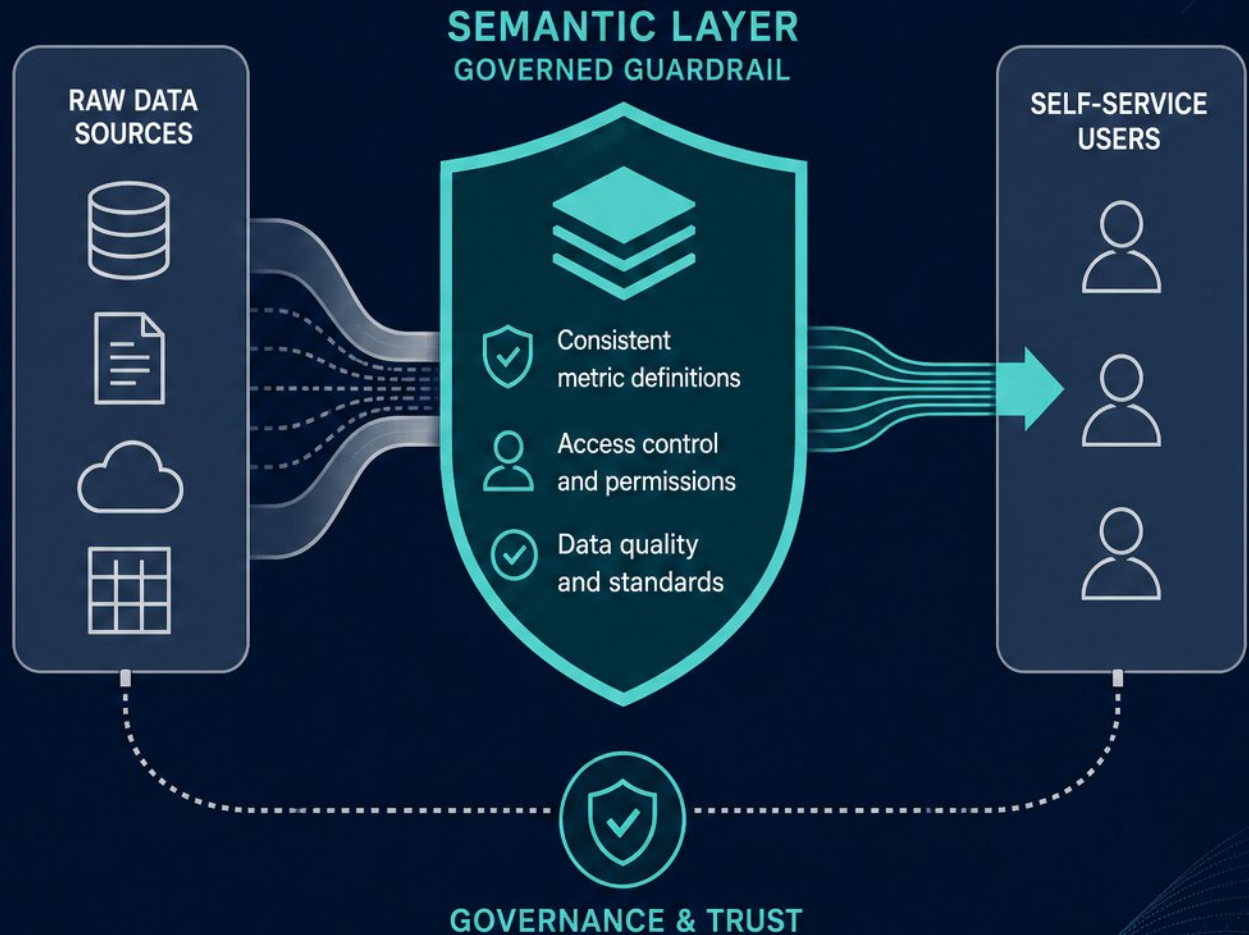
Common Pitfalls in Early BI Adoption

- ! - Fragmented data silos limit a unified business view
- ! - Low adoption when tools feel complex or irrelevant
- ! - Conflicting definitions produce competing versions of truth
- ! - Lack of clear ownership undermines trust and rollout
- ! - Simple governance roles and iterative rollout practices help

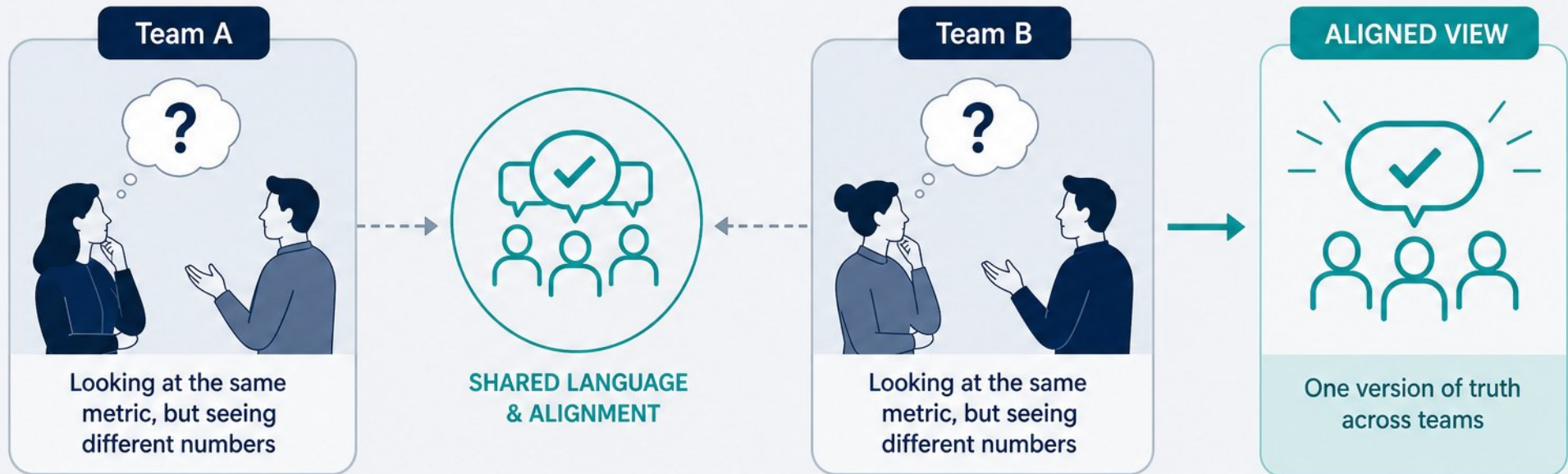


Governance and Trust in Today's BI

- - Data quality and security lead 2026 BI priorities
- - Semantic layers create consistent metric definitions
- - Balance self-service flexibility with clear guardrails
- - Prevent shadow AI and unmanaged report sprawl



Making Numbers Comparable Across Teams



- Different departments use different filters, definitions, and sources



- Shared metric definitions and data lineage create one version of truth

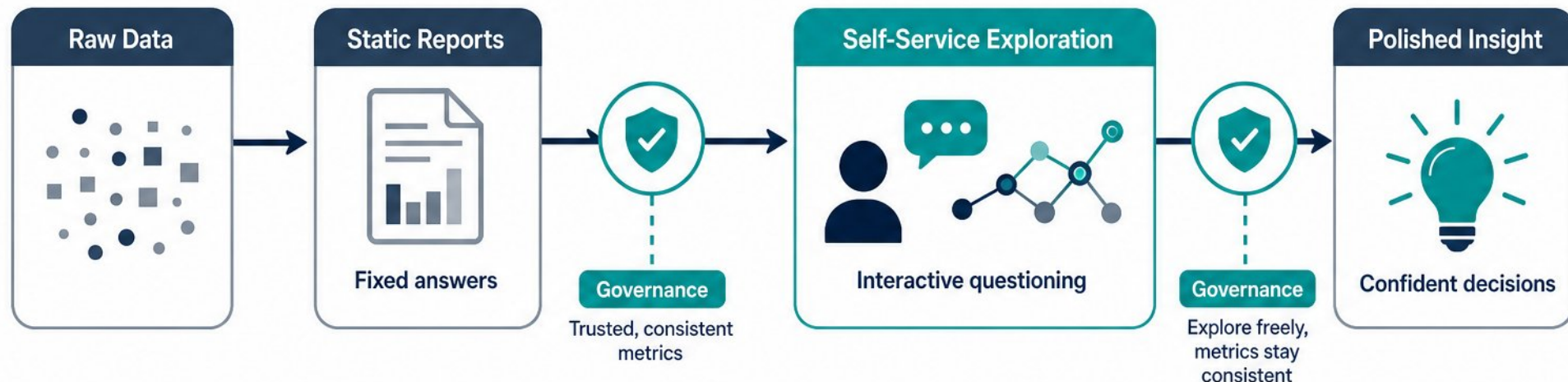


- A governed semantic layer prevents metric drift across teams



- Agree on KPI names, formulas, owners, and refresh timing

From Static Reports to Self-Service Exploration



- Static reports deliver fixed answers; self-service enables interactive questioning



- Analysts and managers get faster insights without waiting on data teams



- Governed models let users explore while keeping metrics consistent



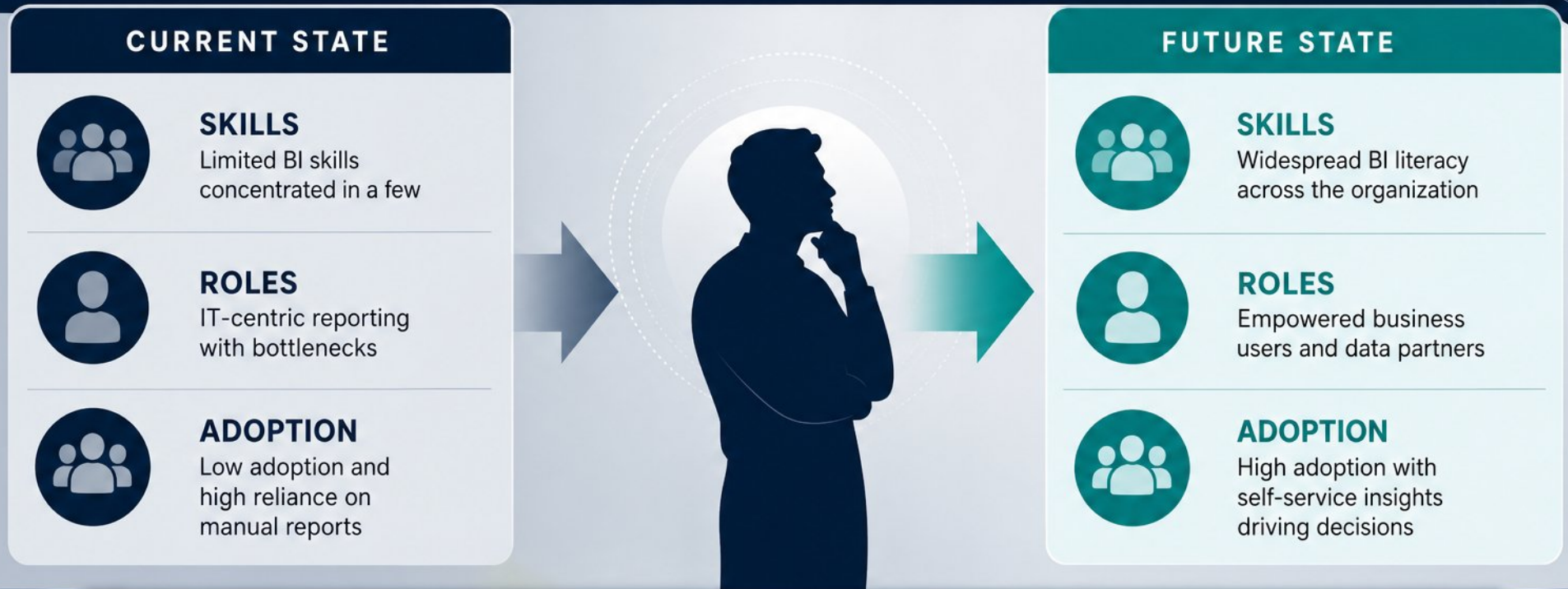
- AI-assisted queries and agentic analytics accelerate answers from natural language

Running a Successful First BI Pilot



- - Start with one high-value business question
- - Inventory available data and team skills
- - Choose a small, measurable pilot use case
- - Build, test, and expand based on user feedback

Practical Roadmap for Getting Started



- Pick one high-value question tied to a measurable business goal



- Start small: one team, one metric, one dashboard



- Map existing data owners, skills, and available BI tools



- Build in short sprints; collect user feedback each cycle



- Track adoption, time-to-insight, and manual report reduction for ROI

Next Steps: Applying BI This Week



- **Recap:** connect data to decisions with trusted dashboards



- **Analysts:** deepen data modeling and visualization skills



- **Managers:** define one KPI to track weekly



- **Everyone:** ask one evidence-based question this week



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