



How to infuse analytics throughout every line of business

Rethinking your approach to data, business
intelligence, and analytics



The opportunity of data has never been greater. Data and analytics are reshaping industries, driving continuously larger changes in both magnitude and scope. Today's organizations need to find ways to capitalize on these changes, leveraging their data to transform processes and results.

According to a survey by McKinsey & Company, organizations that use analytics to inform decisions are realizing substantial gains. These high-performing businesses say their data and analytics initiatives have contributed to at least 20% of their earnings before interest and taxes (EBIT) over the past three years.¹

Unfortunately, that same survey also found that an alarming number of organizations are responding to these shifts with ad hoc, one-off actions and processes that hinder productivity rather than enhance it. This has prevented these companies from realizing the transformational potential of their data.

With data volumes exploding in size and new types of data complicating the equation, the survey showed that the gap between data laggards and leaders is growing ever wider. This suggests that many organizations are still struggling to get over the same analytics hurdles they've dealt with for years.

Leading businesses say
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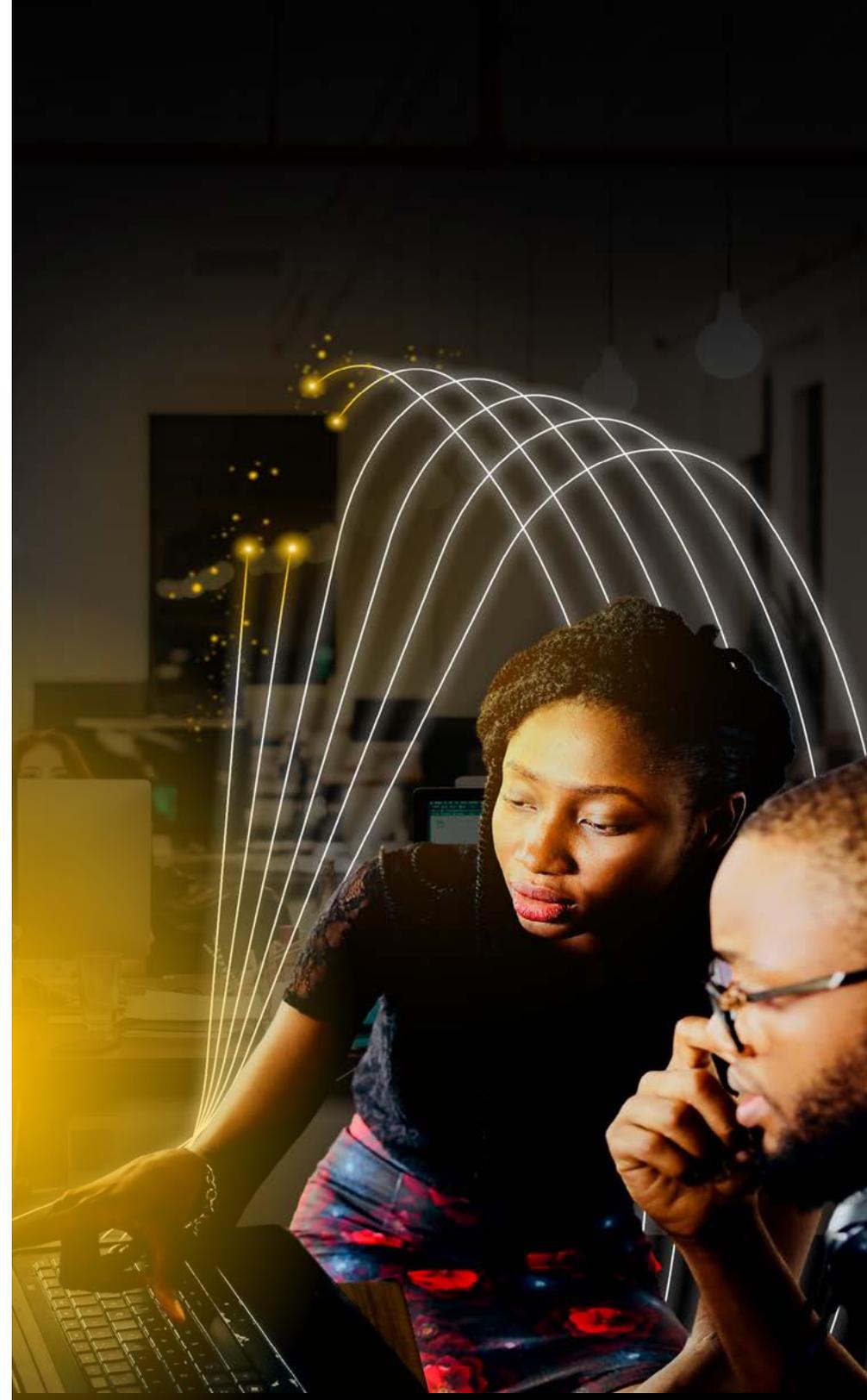
Data: The story so far

You're likely familiar with the story of how we got here. To get a better handle on data, organizations worked to align people, processes, and technology using IT-led initiatives. Following that was a democratization of data, where companies sought to spread the use of data outside the IT department. Business intelligence and analytics (BI&A) tools were supposed to enable every user to make data-driven decisions with a few queries or clicks of the mouse.

It was in that final phase that something went wrong. BI&A tools gave us sleek dashboards and prettier reports, but many organizations failed to achieve the widespread adoption needed to drive the promised data-driven transformation.

As a whole, organizations do seem to be on the path to becoming data-driven. But they need to think differently to overcome the historical obstacles that continue to stand in their way of success.

In this ebook, we'll show how a modern approach that infuses analytics at every touchpoint can help your organization finally realize the full value of your data—sparking growth and providing you with a critical competitive advantage.



What do we mean by “infused analytics”?

Throughout this ebook, we’ll talk about “infused analytics” as the logical and practical solution to BI&A usability and adoption challenges—and as the principle that makes true data-driven transformation possible. But what does it mean for analytics to be “infused”?

Infused analytics (sometimes called “embedded analytics”) is an approach to BI&A that embeds actionable intelligence into every workflow, process, business application, and even internally developed products. By leveraging APIs to create fully customized and unique data experiences for users anywhere, infused analytics puts relevant, actionable intelligence right at the point of decision—rather than forcing users to switch to a separate tool or make individual queries.

Imagine your marketing department optimizing ad spend with insights into campaign performance infused at every decision point of your CRM system. Or your finance department drafting this quarter’s budget with accurate, relevant forecasting analytics and KPI metrics positioned throughout each function of your ERP software.

When infusing analytics into at least half of their workflows, business leaders realize a

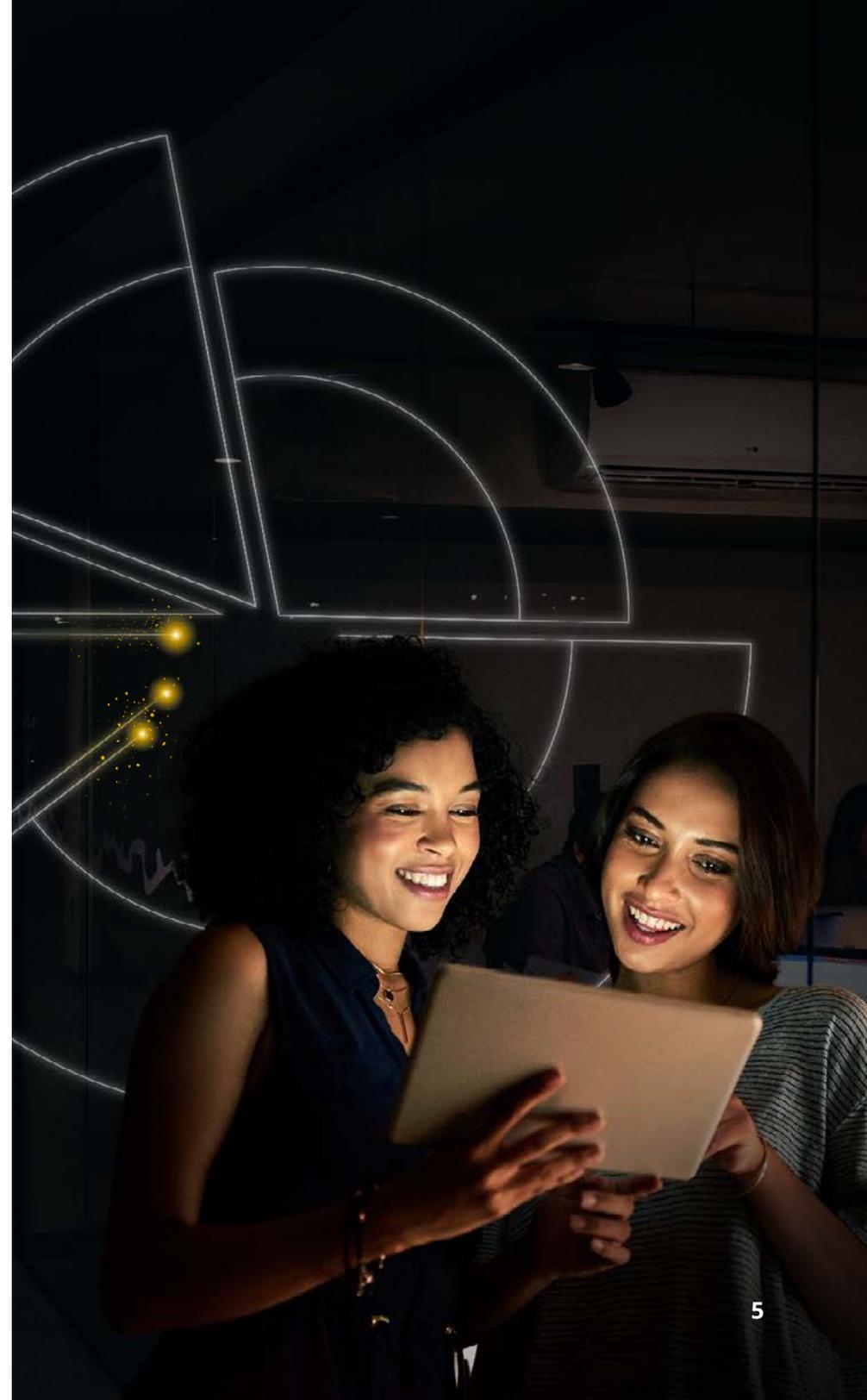
19%

increase in revenue opportunities²



Picture an analytics ecosystem where your teams don't need to pivot to a BI tool and ask it questions. They don't even need to do the work of determining which questions to ask because the answers are already in front of them. Better yet, you can take an action that can automate other steps in your workflow from a visualization. That's what we mean by infused analytics.

In the next sections, we'll examine the barriers to BI&A adoption and show you how to overcome them across specific lines of business—using real-world case studies to demonstrate the transformative power of infused analytics.



Why your BI&A tools aren't delivering transformation

Most organizations aren't happy with their existing BI&A tools. According to research conducted by market intelligence and advisory firm IDC, more than half (52%) of organizations in the US and UK plan to replace their BI&A solution within the next two years.³

So where does the discontent lie? The primary hurdle appears to be usability. The research found that, for enterprise organizations with over 5,000 employees, "ease of use" was the top reason for their desire to replace their current BI solution. Other top reasons cited had their roots in usability: "Ability to customize and extend functionalities" and "integration with other enterprise apps."

This low ease of use is inhibiting BI&A adoption. The IDC research showed that only 13% of respondents use their BI&A tool daily; nearly half (49%) only use it once a month.

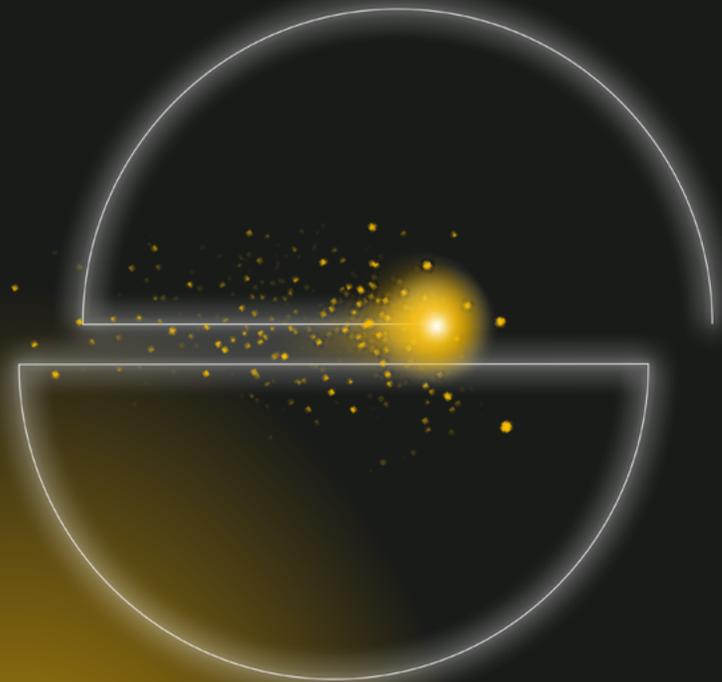
Your BI&A tools aren't delivering the promised transformation because analytics have become too hard, siloed, and divorced from work. Analytics will only become a driving force when data works around individuals, making their jobs easier, not harder.

In order to realize data-driven transformation, your organization must change its approach—rather than attempt to change the behavior of your entire workforce. Read on to find out how it's done.

More than

50%

of organizations plan to replace their BI&A solution in the next two years³



Marketing

Marketers rely on data and analytics to help them drive customer engagement, determine the perfect CTA, optimize for SEO and SEM, and accelerate the marketing funnel. Broad demographic insights are no longer sufficient—today's marketers must have the ability to both understand customers from a 360-degree view and drill down to create personalized offers at the individual customer level. Too often, this means pivoting away from the company's CRM solution and navigating multiple complex systems.

Infused analytics can embed actionable intelligence directly into your CRM or communication platform, helping marketers make data-driven decisions where they already spend their time. Infused analytics can also automate steps throughout your marketers' workflow, driving marketing automation and workforce collaboration—no matter where work takes your marketing team.

For example, imagine a marketer using a communication platform like Slack and receiving a notification about an ad spend problem. Armed with that real-time intelligence, the marketer can decide to pause ad spend. These actions might then prompt the automatic scheduling of a meeting, with invites sent to predefined stakeholders and an updated data-infused presentation attached to the invite. All of this would be achieved without the marketer ever needing to leave Slack or pull up a different tool.

Trupanion increases data transparency and pet owner peace of mind



Trupanion is the second-largest and fastest-growing pet insurance company in North America, helping people pay for veterinary bills if their pet gets sick or injured.

Challenge

Despite explosive growth, disconnects between departments and a variety of skill levels made it hard to keep pricing fair and accurate

Needed accurate, comprehensive, and immediate information to acquire new customers

Action

Leveraged Sisense to provide transparency across 20 departments that tied activities to outcomes

Built robust data management system without needing deep IT expertise

Outcome

With infused analytics, Trupanion:

Delivered transparency into acquisition costs and lifetime value for prospects and customers

Increased upsells and reduced churn with precise segmentation across animal breeds, geographies, referral sources, and other categories

Displays real-time KPIs on office walls, including "number of pets helped"⁴

“We’re a data-driven organization. To satisfy our rapidly increasing need for information, Sisense provides a better ROI than investing in headcount or other tools.”

- TJ Houk, BI Director at Trupanion

Finance

Finance departments spend too much time collecting financial and operational data. They need solutions that allow them to focus more on strategic work, like modeling scenarios and forecasting revenue.

With infused analytics, finance departments can embed actionable intelligence into Enterprise Resource Planning (ERP) systems or collaboration tools. When finance workers can infuse analytics into Microsoft PowerPoint and Google Slides, they can interact with the data live while presenting to others—rather than relying on ugly, static screenshots that no one can understand. They'll make major strategic decisions with confidence by understanding their numbers from every customer, product, and process on a daily basis.



Orion doubles its business

Orion is a portfolio accounting SaaS provider for advisors.



Challenge

Investment platform was not keeping up with customer expectations to go deeper into portfolio performance

Static reporting solution served up performance reports with out-of-date data on client investments

Action

Chose Sisense after attempting to build its own solution and testing five different BI solutions

Embedded interactive analytics so customers could pre-configure dashboards, explore their data, and drill down into details

Outcome

With infused analytics, Orion:

Doubled its revenue

Went from concept stage to final product within just two months

Onboarded 98% of its clients on the new tool⁵

“Our team loves (Sisense), because they can go in and figure out exactly what the data is, and how they got the answers they got. They can drill right down to the detail, so it’s perfect for them.”

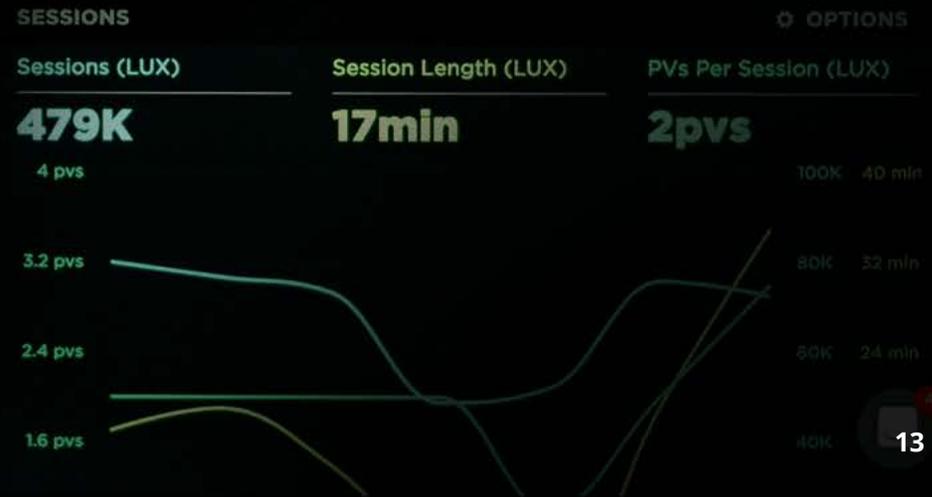
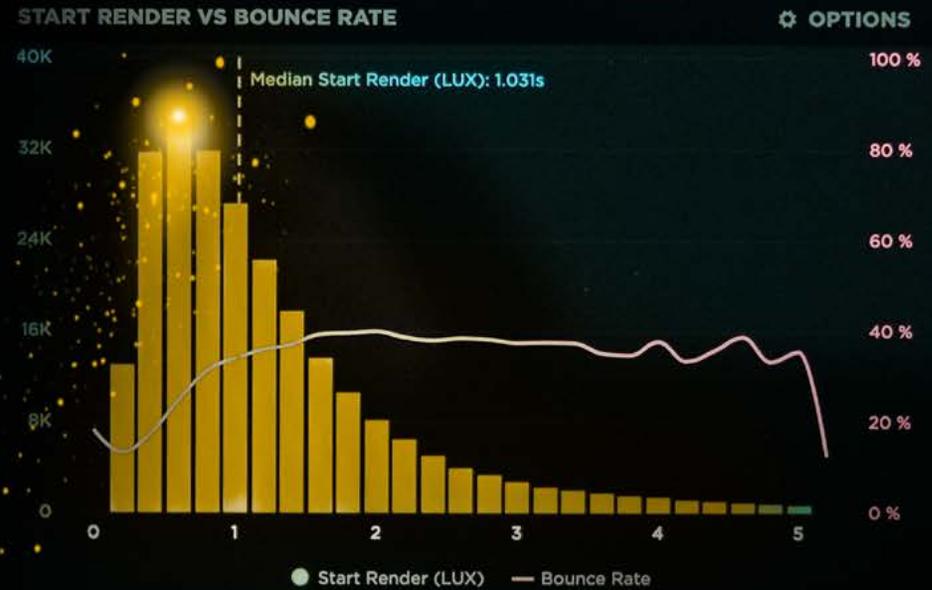
- Malinda Jepsen, BI Specialist at Orion

Product

Product teams always look for new ways to differentiate their offerings and improve customer experiences. They recognize the potential benefits that analytics capabilities can provide to their customers, but they are finding that static dashboards and discrete, complicated platforms force users to leave their workflows and offer limited value.

By infusing fully white-labeled and customized analytic experiences into customer applications and workflows at scale, product teams can get to market faster and enhance their solutions in measurable ways. They can stand out from the competition while vastly improving customer experiences without needing new development resources.

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Tessitura Network de-risks its embedded analytics project



Tessitura Network is the maker of an analytics platform used by performing arts and cultural organizations.

Challenge

Needed to empower users with data-driven insights embedded into a unified enterprise CRM solution

Action

Worked with Sisense to develop a completely automated and integrated solution

Created processes and support systems that ensured continued customer success and encouraged adoption, including training and content structures

Built a solution that meets customers' key needs and provides analytics in a seamless and efficient way

Outcome

With infused analytics, Tessitura Network:

Delivered significantly improved, unique data experiences—such as enabling users to click on a visualization and get a list of their customers for immediate follow-up and communication

Drove operational efficiencies and executive engagement for end customers

Created stickiness and engagement for its arts & culture customers⁶

“The best thing I can say about Sisense is that we never ran into a use case that we couldn’t do. We were able to implement everything we needed.”

- John Jakovich, VP of Business Intelligence at Tessitura Network

Sales

Sales teams need insights that empower them to meet customer needs and accurately identify and speak to pain points. While analytics have produced positive results for sales teams, static dashboards and clunky analytics tools have resulted in a slight decline in their use. According to the 2020 Salesforce State of Sales Report, 67% of organizations are using analytics for sales reporting—down from 70% in 2018.⁷

Infused analytics provides salespeople with customer intelligence directly in their CRM system or sales engagement platform, where they spend the bulk of their time. This can give them updated information about their prospects, including content viewed and emails they have interacted with, and they can update their CRM system directly from data visualizations within their sales engagement platform.

Salespeople can also use infused analytics to examine sales figures across any number of factors and customer demographics. The resulting insights will help them optimize their tactics, identifying patterns to further improve their ability to connect with, serve, and sell to existing and potential clients.

ADHI, Inc. accelerates workflows with real-time insights



American Dream Home Improvement, Inc. (ADHI, Inc.) is an exterior home repair and storm restoration company.

Challenge

Needed better ways to support its hundreds of sales representatives

Experienced slow turnaround for data requests, with some departments waiting months for reports

Action

Used Sisense to provide its salespeople with real-time access to regional data

Outcome

With infused analytics, ADHI:

Gives its salespeople immediate insights into ADHI performance, enabling better sales decision-making

Fulfills data team requests much faster and with less need to write code or create macros⁸

"It's much faster and much easier, specifically for the end user. They can just go to a dashboard and click a few filters and see exactly what they're looking for."

- Josh Farekas, Data Analyst at ADHI, Inc.

Customer service

Too much of the customer service department's time is spent "putting out fires"—resolving customer complaints to maximize retention. Customer service departments need solutions that help them identify and predict potential problems before they impact the customer. They need analytics that enable them to take a more proactive approach to their jobs so they can focus more on creating great experiences and less on resolving bad ones.

With infused analytics, customer service departments can make better decisions based on real data—directly within their CRM system. They can automate workflows and send personalized messages to customers directly from data visualizations. And they can respond to and fix issues proactively—while gaining more time to work on delivering customer value.



Skullcandy gets to know customers with predictive and sentiment analysis



Skullcandy is an audio hardware manufacturer that makes headphones, wireless earbuds, and speakers.

Challenge

Sought to become more competitive by powering next-level innovation through advanced analytics

Action

Worked with Sisense to leverage customer service data and AutoML data science capabilities to create powerful, predictive BI&A capabilities

Reduced involvement of IT and administration overhead with automated reports and data preparation

Outcome

With infused analytics, Skullcandy:

Accurately predicts return rates for products that haven't even been released yet

Uses reviews and warranty claims to understand purchase drivers and sentiment and to inform new product designs⁹

“As a long-time Sisense customer, we knew that we had an open analytics platform on our hands that would be the backbone of this next analytics frontier.”

- Mark Hopkins, CIO at Skullcandy



Data team

Data teams need to deliver insights to the whole organization at the depth, speed, and scale required by today's business world. To achieve this, they must have access to robust visualization capabilities, fast, high-performing analytics tools, user-friendly applications, and a single source of truth that coordinates data from disparate systems.

Infused analytics empowers data teams wherever they are, transforming how they interact with analytics and their processes. Data teams can get insights directly within their CRM, ERP, and collaboration tools so they can take action to serve all other business units. And by integrating data sources into a single tool, data teams can enable users of all skill levels to answer complex questions, see the big picture, and drill down for precise insights.

GitLab enables fast, iterative, controlled software life cycles



GitLab is a complete DevOps platform, delivered as a single application.

Challenge

Needed to equip its teams to work with maximum agility and efficiency

Required a solution that generated business value quickly

Action

Launched an evaluation to uplevel the use of data across the organization

Chose to include Sisense as a key tool for the data team after examining a wide range of options

Outcome

With infused analytics, GitLab:

Leverages its data for business value across the entire organization

Performs more complex analytics and creates powerful visualizations¹⁰

“Sisense has multiplied the effect of the data org beyond the data team... (it's) opened up so many possibilities that everyone on the team (is) super excited about.”

- Taylor Murphy, Staff Data Engineer at GitLab

Logistics and operations

Logistics and operations departments must evaluate data from multiple sources and lines of business. It's far too easy for these workers to get lost in the noise, unable to draw accurate, timely insights from disparate data streams, unconnected systems, and silos.

Infused analytics can empower ops teams by embedding insights into manufacturing or warehouse floors and into handheld devices with near real-time intelligence. Ops teams can use infused analytics and purpose-built big data solutions to maximize productivity and reduce labor costs by automating and streamlining processes directly from data visualizations.

Air Canada improves flight safety

Air Canada is the largest provider of scheduled passenger services in the Canadian market.



Challenge

Constantly generated hundreds of gigabytes of reports on safety-related KPIs

Needed fast, efficient ways to transform that data into critical insights—and ensure the information is communicated and acted upon

Action

Invested heavily in analytics and AI to improve safety

Partnered with Sisense to extract meaningful intelligence from safety data

Outcome

With infused analytics, Air Canada:

Improves safety in real time for both passengers and flight staff

Empowers frontline employees to make immediate decisions with actionable intelligence wherever they are¹¹

“Unless you have a clear method of slicing and dicing data and presenting it to users, it’s not really useful. With a tool like Sisense, it changes the game altogether.”

- Shaul Shalev, Safety Analytics & Innovation Manager at Air Canada

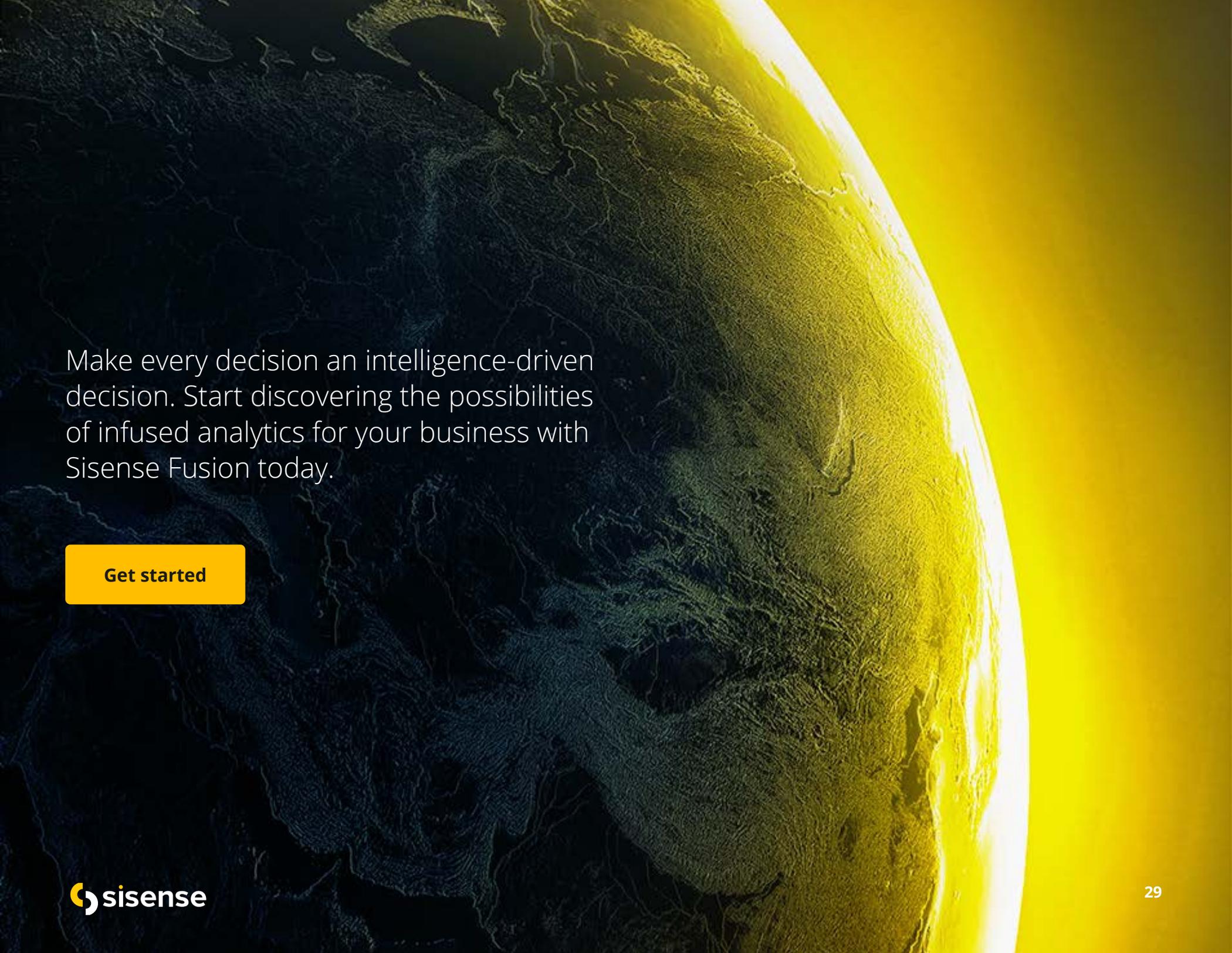
Next step: Meet Sisense Fusion

It's time to think differently about data and how we use it—by empowering every employee to make smarter decisions by infusing actionable intelligence that can automate multiple steps within their existing workflows. Introducing Sisense Fusion, the AI-driven analytics platform that instantly infuses intelligence at the right place and the right time—every time.

With Sisense Fusion, you can **fuse** use cases, business objectives, and technical requirements to create a robust analytics foundation and strategy. **Connect** cloud, in-application, and on-premises data for a comprehensive, 360-degree view across every line of business, application, and data store.

Analyze, explore, and collaborate with solutions that scale across all skill levels and use cases for an integrated analytics experience. **Augment** every analysis with predictive analytics and machine learning. And **infuse** intelligence everywhere by embedding actionable intelligence wherever your users—from end customers to employees—spend their time.





Make every decision an intelligence-driven decision. Start discovering the possibilities of infused analytics for your business with Sisense Fusion today.

[Get started](#)

- 1 Over the last three years, as reported by leaders at the organizations. "Catch them if you can: How leaders in data and analytics have pulled ahead." McKinsey & Company, September 2019.
- 2 <https://www.sisense.com/reports/getting-strategic-value-from-data-analytics-when-initial-attempts-fail/>
- 3 <https://www.sisense.com/blog/sisense-idc-survey-finding-value-in-data/>
- 4 <https://www.sisense.com/case-studies/trupanion/>
- 5 <https://www.sisense.com/case-studies/orion/>
- 6 <https://support.sisense.com/hc/en-us/articles/360019019613-Automation-Integration-and-Customization-at-Tessitura-Network>
- 7 "State of Sales," fourth edition. Salesforce, 2020.
- 8 <https://www.sisense.com/case-studies/american-dream-home-improvement-inc/>
- 9 <https://www.sisense.com/blog/how-skullcandy-uses-predictive-and-sentiment-analysis-to-understand-customers/>
- 10 <https://www.sisense.com/case-studies/gitlab/>
- 11 <https://www.sisense.com/case-studies/air-canada/>